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ABSTRACT

Practice materials and teaching suggestions for a refresher course in stenography are presented in 10 lessons, eight of which include drill practices in shorthand and typing. Each lesson includes objectives, content outline, and content details with teaching tips. Where appropriate the instructor may duplicate materials to give to students or make transparencies for classroom discussion. Practice materials for the work of secretaries in a bank and in a law office are based on studies of the work done in such offices. Course content is suitable for use in the adult education programs of school districts and Boards of Cooperative Educational Services and in the community colleges of New York State. Teachers may also find the office applications useful in secretarial practice classes at the high school level. (MF)

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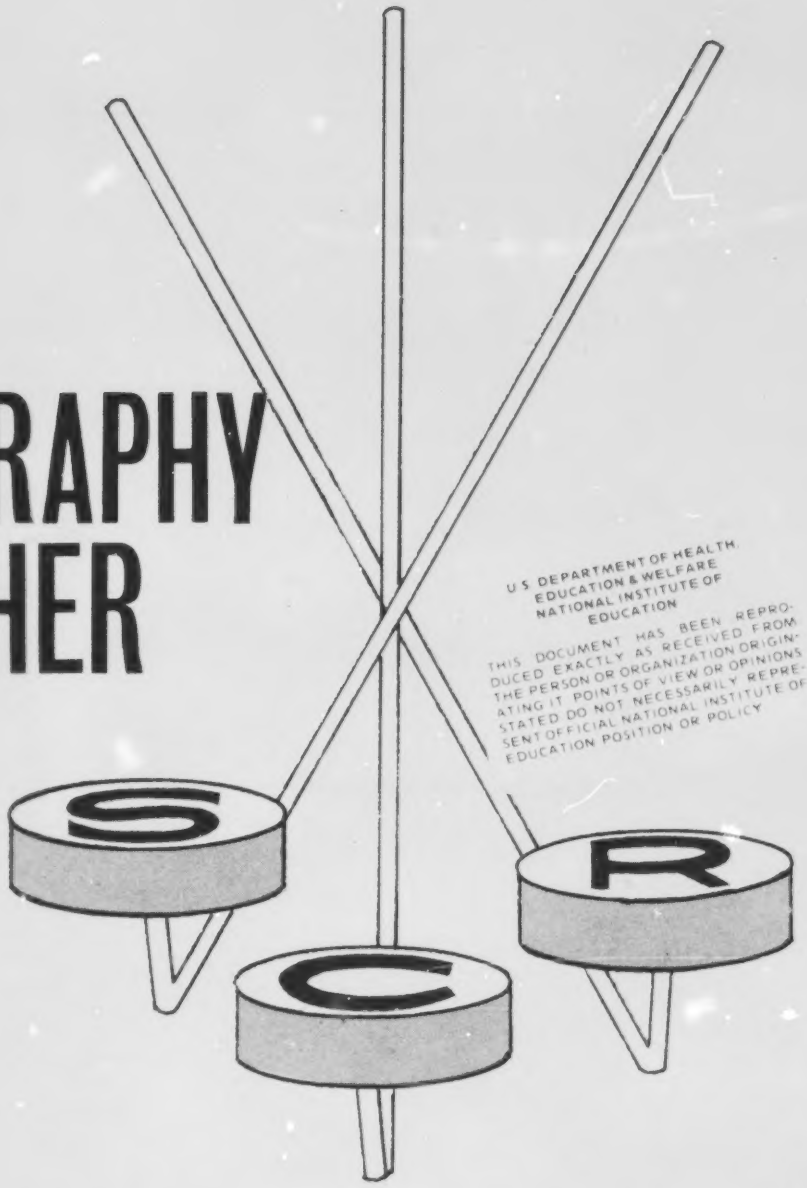
INSTRUCTOR'S GUIDE FOR AN ADULT COURSE

ED141598

STENOGRAPHY REFRESHER COURSE

PART II



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THE UNIVERSITY OF THE STATE OF NEW YORK / THE STATE EDUCATION DEPARTMENT
BUREAU OF OCCUPATIONAL EDUCATION CURRICULUM DEVELOPMENT
ALBANY, NEW YORK 12234

1976

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78689

Foreword

Stenography Refresher Course, Part II, described in this book, is the second publication in a two-part series. Part I, published in 1973, was aimed at those who once had learned and used stenography and had then been away from it for a number of years. Part I was intended to bring them up to at least a level of entry employment.

Part II is intended to *apply* the skills a student has acquired in Part I. Completion of this second course should qualify the student for a higher level job. Completion of Part I (or its equivalent) should be a prerequisite for admission to a Part II class.

The scope and content of Part I and the general nature of Part II were determined by an advisory committee consisting of the following: Eileen M. Burns, business teacher, Henninger High School, Syracuse; Phyllis Colpitts, assistant professor, School of Education, State University of New York at Albany; Hobart H. Conover, chief, Bureau of Business Education; Robert Fleig, associate, Bureau of Business Education; E. Noah Gould, associate, Bureau of Occupational Education Curriculum Development; Ernest Kastelic, teacher, Cornwall Central High School, Cornwall; and Ethel Keegan, supervisor of business education, Nassau County Vocational Education and Extension Board, Hempstead. Mr. Gould served as chairman of the committee.

Parts I and II were planned in detail by Miss Colpitts and the content information was gathered by her, much of it by visits to banks, law offices, and other offices. Miss Colpitts wrote Part II with the help of Ruth E. Webster, assistant professor, Secretarial Science Department, State University of New York Agricultural and Technical College at Cobleskill. Mr. Gould guided the development and writing of the course, edited the manuscript, and was in general charge of the series.

G. Earl Hay, *Chief*
Bureau of Occupational Education Curriculum Development

Gordon E. Van Hooft, *Director*
Division for Curriculum Services

Message to the Instructor

This book presents suggested content for *Stenography Refresher Course, Part II* together with practice materials and teaching suggestions. All lessons contain practice materials while the first eight lessons contain drill materials specifically on typing and shorthand. Wherever it is appropriate, the instructor can duplicate materials from the book to give to students for reference or for practice. Or transparencies can be made from some pages for classroom discussion. The book has been bound in a way which should make pages easy to remove. The pages have been punched with holes so they can be kept in a three-ring looseleaf binder.

Practice materials for the work of a secretary in a bank and in a law office are based on studies of the work done in those kinds of organizations. These studies included visits to banks and law offices and interviews with secretaries and management personnel in the places visited.

The content of this booklet is suitable for use in the adult education programs of school districts and Boards of Cooperative Educational Services (BOCES), and in the community colleges of New York State. Teachers will also find the office applications to be useful in secretarial practice classes at the high school level. This course can generally be covered in 10 sessions of 3 hours each, but that pattern is by no means universal, nor is it mandatory in any sense.

The instructor for this course should be a person with good training and experience in at least one system of stenography and a good background of experience in office procedures. Experience in teaching stenography and typing is also highly desirable.

An instructor or administrator who needs help in planning or conducting a course using this publication may contact the Bureau of Business Education, State Education Department, Albany.

HOBART H. CONOVER, *Chief*
Bureau of Business Education

DOUGLAS T. ADAMSON, *Director*
Division of Occupational Education Instruction

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Section 1:

The Job Application

Lesson 1
Introduction

OBJECTIVES

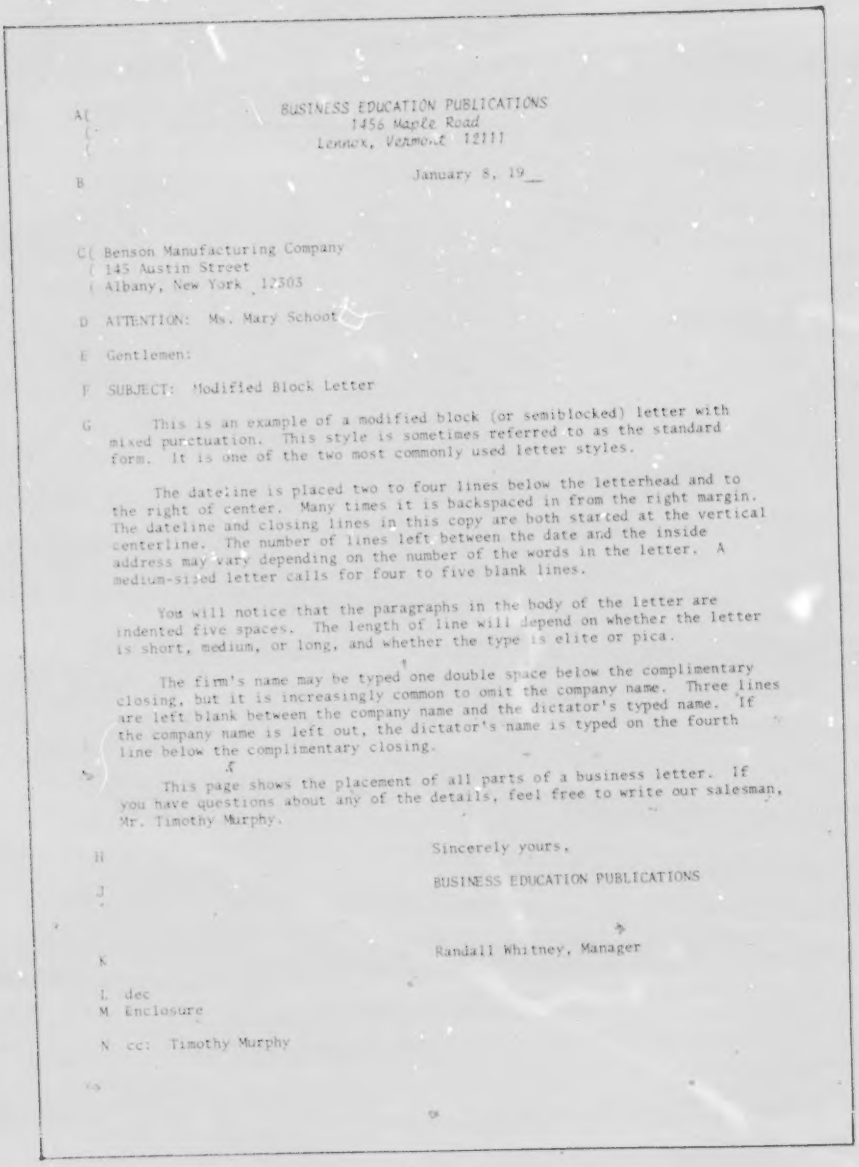
1. To get acquainted
2. To present overview of course
3. To demonstrate parts of typewriter
4. To review format of business letter
5. To assess skill levels

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Orientation	Introduce yourself and give a brief summary of what you do and have done. Explain the purpose of this session: to get acquainted with one another and to determine individual goals for the course. Set the tone for this and future sessions with a relaxed atmosphere to gain group participation.
A. Getting acquainted	Have members of the class break into groups of two and get acquainted. Then have them introduce each other to the class. They should include name, where from, employment, and any other pertinent data. Have members of the class fill out a card for you giving name, address, telephone number, educational background, work experience, shorthand speed, typing speed, areas needing improvement, and reasons for taking the course.
II. Purposes of the Course	Explain the purposes of the course: • To improve shorthand and typing skills through use • To review the steps in securing a job • To acquaint the members of the class with a variety of applications of basic office skills
A. Refresher	The first three sessions will aim at refreshing stenography and typing techniques including applications of those techniques. The techniques will then be further applied in completing specific assignments.
B. Quality of work	Emphasize to the class the fact that all work done must be of a quality *acceptable* in an office.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
C. Jobs available	Explain that there will be an opportunity to discuss the types of jobs which might be available including their duties and skill requirements.
III. Course Content	Discuss the general objectives of the course and give an overview of the content. Each session is to include: a review of previous material, discussion, and practice of tasks as in an office.
A. Textbooks and references	A textbook is not needed in this course because needed materials are supplied. However, you should have textbooks and reference materials available for use. Examples include Murphy, Gavin, and Lessenberry.* Suggest that the members of the class may wish to get their own copy of a secretarial reference manual for use in class and on the job. *Suggested Teaching References* are Gavin and House. Supplies needed are: shorthand notebook, pens, pencils, eraser, eraser shield, correction tape, typing paper, carbon paper, and a folder with pockets to hold materials as they are handed out.
IV. Review of Typewriter Parts	Acquaint class with the parts of the different makes of machines being used.
A. Manipulative parts	Show where the following parts are located and demonstrate the function of each. •Paper guide •Line regulator •Variable line spacer •Paper release •Paper bail •Ribbon control •Touch control •Multiple-copy control Follow up by having the class name parts of a specialized nature found on some machines.
B. Operating keys	Demonstrate correct usage of these operating keys: •Margin sets •Margin release •Carriage return •Shift •Paper release •Backspace •Tabulation •Halfspace •Repeat keys

*Full citations are given in the bibliography.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
V. Review of the Business Letter	Indicate to the students that this review of the business letter will be followed by dictation and transcription.
A. Modified Block letter (Also called (Semiblocked)	Make and distribute copies of Fig. 1.1. Then review it as an example of the Modified Block style of letter with mixed punctuation. The copies will be valuable to the class for reference.
B. Basic parts	Point out the basic parts of the letter as shown in Fig. 1.1. Point out variations that can be used in placement of dateline. Discuss spacing, sections to be typed in ALL CAPITALS, salutations, and closings in general use. Also mention that in the Modified Block letter, the *Attention* line and the *Subject* line can be centered.
C. Optional parts	Explain to the class that, in addition to the parts shown in Fig. 1.1, there are other notations that may be needed on a business letter. One is the blind carbon copy notation. Others include special mailing notations such as the following: •Airmail •Special Delivery •Registered •Personal/Confidential
D. Other styles	Now review with the class the information on letter styles given on pages 12-15 of *Stenography Refresher Course*, Part I.
VI. Inventory of Skills	Make copies of Fig. 1.2 for the class to use as warmup drill material.
A. Typing	Allow them several minutes to limber up their hands using the drills from section A of Fig. 1.2. Then ask students to take two 5-minute timed writings from Fig. 1.3. A number at the end of a line denotes the number of words accumulated to the end of that line. The class should check their own papers, circle errors, and hand in the better copy.
B. Shorthand	Check the student information cards to determine the speed at which to dictate two or three short letters. If time does not permit checking cards, ask the class for approximate speeds at which to dictate. For practice, dictate from the lowest to the highest speeds using section A of Fig. 1.2.



A BUSINESS EDUCATION PUBLICATIONS
1456 Maple Road
Lennox, Vermont 12111

B January 8, 19__

C Benson Manufacturing Company
145 Austin Street
Albany, New York 12303

D ATTENTION: Ms. Mary Schoot

E Gentlemen:

F SUBJECT: Modified Block Letter

G This is an example of a modified block (or semiblocked) letter with mixed punctuation. This style is sometimes referred to as the standard form. It is one of the two most commonly used letter styles.

The dateline is placed two to four lines below the letterhead and to the right of center. Many times it is backspaced in from the right margin. The dateline and closing lines in this copy are both started at the vertical centerline. The number of lines left between the date and the inside address may vary depending on the number of the words in the letter. A medium-sized letter calls for four to five blank lines.

You will notice that the paragraphs in the body of the letter are indented five spaces. The length of line will depend on whether the letter is short, medium, or long, and whether the type is elite or pica.

The firm's name may be typed one double space below the complimentary closing, but it is increasingly common to omit the company name. Three lines are left blank between the company name and the dictator's typed name. If the company name is left out, the dictator's name is typed on the fourth line below the complimentary closing.

This page shows the placement of all parts of a business letter. If you have questions about any of the details, feel free to write our salesman, Mr. Timothy Murphy.

H Sincerely yours,

J BUSINESS EDUCATION PUBLICATIONS

K Randall Whitney, Manager

L dec
M Enclosure

N cc: Timothy Murphy

Figure 1.1
MODIFIED BLOCK STYLE OF BUSINESS LETTER

A Letterhead
B Date
C Inside Address
D Attention notice*
E Salutation
F Subject line*
G Body
H Complimentary close
J Firm name*
K Signature
L Identification of dictator or typist or both
M Enclosure
N Carbon copies*

*These items are often left out.

(A) DIRECTIONS FOR TYPING: Use a 70-space line and 5-space indentions, double spaced. Type the word practice three times and the paragraphs twice.

executive personnel complaints accept responsibility certainly justice attendance includes divided tommorrow beginning attitude

I learned while listening to a panel composed of executives 12
and personnel directors that the number one complaint concerning 25
beginning workers is poor attendance. An attitude that is spread- 38
ing is the "I was only a few minutes late — who cares" attitude. 51

When you accept a position, you accept a responsibility to 63
that firm. That responsibility includes being present and on 75
time each day. You are part of a team, and when you are not 87
there to do your share of the work, it has to be divided among 100
those who are loyal workers. This slows down the entire opera- 113
tion. It certainly does not make you popular with fellow 125
workers. 127

(B) SHORTHAND WARMUP: All shorthand dictation material in this book is marked off for dictation in 15-second intervals. A slash mark denotes the end of such an interval. The practice material below is marked at 80 standard words per minute.

Do not have the feeling that you can get caught up on your work tomorrow. Getting caught up in a rush results in/ errors which cause many hours to be wasted by others tracing your mistakes.

If you do not report to a job/ because you are not happy there, do justice to both yourself and your employer by looking for another/ position. Move on before you are moved. One of the panelists stated that the major reasons for dismissal/ from his firm were tardiness and absenteeism. Make a habit of being at your work station on time./ Punctuality is a virtue of the real professional worker. How do you stack up in this regard?/

Figure 1.2
TYPEWRITING AND SHORTHAND PRACTICE MATERIAL
FOR LESSON 1

Your image as a secretary is first presented to the firm through your letter of application and data sheet. This entrance into the world of work requires your utmost care in letter writing and organization of facts. 13 26 40 43

Frequently the preliminary job application is made in the form of a business letter. The letter of application should be free from mechanical and grammatical errors. It should provide the potential employer with the important details of your educational preparation and job skills. 56 69 83 97 100

As soon as you learn of a job opening, you should apply immediately; therefore, it is an advantage to have data sheets prepared and an outline of a letter of application ready for immediate use. 114 128 139

Choose the stationery for your letter with considerable care. A white, unruled paper of letterhead size is preferred because it carries a mark of dignity and refinement. 152 166 173

The data sheet should also be prepared on the same quality of paper. The information to be presented in a data sheet falls into several categories: Personal Data, Education, Experience, and References. Sometimes, because of the specialized nature of a position, other sections are added. 185 198 212 226 231

The traditional approach is to include the section on Personal Data first. This section should include the applicant's name and address, age, height, weight, and date of birth. 244 257 267

The section on Education is next. Your most recent schooling should be listed first in this section and then followed by other educational experiences, according to the year. 279 292 302

The same arrangement is used for the section dealing with Experience. Always list your most recent work experience first. Don't leave out part-time work experience or substitute work — all are of importance. They show the exposure you have had to the working world. Do not just list employment by title alone. Instead, list the job title and then tell what your exact responsibilities were in this position. 315 328 341 355 368 381 383

The next section should deal with References. Secure permission either by telephoning or writing the people whom you wish to name as your references. Their permission usually indicates a willingness to prepare a favorable recommendation. In typing the references, be sure that all addresses are accurate and complete with zip codes. It is also courteous to include telephone numbers for people who can be reached locally. Four references are considered sufficient. Choose wisely those you will use. Previous employers are the best. A former guidance director, a teacher, or others who know about your working qualifications are also good. Avoid using relatives. Someone in the firm where you are applying who is familiar with your ability as a secretary will make an excellent reference. 396 410 424 438 452 465 479 492 505 519 532 543

Figure 1.3
TYPEWRITING PRACTICE MATERIAL

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
1. Warmup drill	Start by previewing shorthand outlines on the chalkboard. Have the class read the outlines back in unison. Dictate the warmup from Fig. 1.2A. Check for any difficulties the students might have with outlines. Have volunteers read back. Repeat at various speeds as many times as necessary. Go over punctuation and spelling.
2. Dictation and transcription	Before beginning the dictation, tell the class the number of letters to be dictated and the speeds. Following the dictation, have each student transcribe the best take in Modified Block (Semiblocked) form with mixed punctuation and with an enclosure notation. Collect these letters. Figs. 1.4, 1.5, and 1.6 may also be used for dictation material. These letters are marked off in intervals for dictating. Fig. 1.4 is marked for 60 w.p.m., Fig. 1.5 for 80, and Fig. 1.6 for 100. These letters may also be used as models for the transcripts to be displayed on the bulletin board. Check with the class for their diagnosis of the areas they feel need improvement. Allow time for questions and discussion. Inform the class that the next session will be devoted to steps in obtaining a job. They will need to think about their own backgrounds, including dates and plans pertaining to their education and work experience. Suggest that they bring needed supplies to the next session. *Suggested Teaching References:* Leslie, *Dictation for Mailable Transcripts.*

February 22, 19__

Mr. John Hancock
125 Spruce Street
Worcester, Massachusetts 12578

Dear Mr. Hancock:

We are glad to aid you in the research project you are undertaking/ involving the hiring of new employees.

First, as I am sure you know, there is no/ preferred style as far as a data sheet is concerned. Naturally, we expect that/ anyone applying for a typing or secretarial position will have a well/ composed letter and an accurate data sheet. Both pieces of writing should show good thought/ in organization and preparation.

A data sheet gives a prospective employer/ an insight into the abilities of the applicant. One thing we do prefer/ is that applicants state both in the letter and in the first section of the data sheet/ the position they are seeking. A company of this size often has more than one/ position announcement in the newspaper on the same day.

We are sending you the list of/ employment figures you requested. When your research paper is finished, please send us a/ copy.

Yours sincerely,

ACD COMPANY

Bruce Maples
Personnel Director

ez
Enc.

Figure 1.4
LETTER TO DICTATE
FOR TRANSCRIPTION PRACTICE AT 60 W.P.M.

JOSLYN PAPER COMPANY
Established 1824

125 Plymouth Street *Richmondville, New York 12149*

September 12, 19__

Mr. Richard Nelson
26 Fifth Avenue
Green Hills, New Hampshire 03046

Dear Mr. Nelson:

Congratulations on your new business endeavor! We are proud that you have called on us to/ help you select your new stationery. We know you feel that great care should be taken in selecting the stationery/ that is going to help open the doors of success to you in your business.

Your stationery will represent/ you and your product. We know that you feel that your product is good and deserves the best; then it is JOSLYN STATIONERY/ you will want. The Joslyn Paper Company has been helping businesses succeed since 1824.

Our personal representative, Mr. Harold Randall, will be calling you tomorrow to make an appointment/ convenient to you. He will show you samples of stationery that will help to enhance your product.

We look/ forward to serving you. A brochure explaining the history of our company is enclosed.

Sincerely yours,/

Julius LaMonte
Sales Manager

bc
Enc:
cc: Harold Randall

Figure 1.5
LETTER TO DICTATE
FOR TRANSCRIPTION PRACTICE AT 80 W.P.M.

A-Z PUBLICATIONS
Lake Road
Lakeland, New York
00123

August 10, 19__

Dr. Ruth Gray
138 Elm Avenue
Gloversville, New York 12078

Dear Dr. Gray:

Congratulations on your new secretarial handbook, Modern Secretarial Reference Book. Equipped with one of/ these books, any secretary can feel secure knowing she has an authoritative, up-to-date source of information.

Two parts of the book that I think you developed exceptionally well are the sections on the data sheet and letter of application and the one dealing/ with punctuation.

You asked me what changes I would suggest. There is one part I would like to see added in your next revision and that is/ a section on word processing. Word processing is a term that is being tossed around loosely and very few people understand what the/ term really means. Most people think of word processing only as the old transcription-typing pool. It is true that many businesses have just/ gone to the new term without following through on other concepts that word processing involves.

I am sure that with your connections in the world/ of business you could compile a fine unit on this subject and clear up a vague term for many of us.

I expect to see more good reference books/ in secretarial science coming out under your authorship. I hope the enclosed list of firms with word processing centers will be of value to you.

Sincerely yours,/

A-Z PUBLICATIONS

Lucy Rhodes, Manager

ci
Enc.

Figure 1.6
LETTER TO DICTATE
FOR TRANSCRIPTION PRACTICE AT 100 W.P.M.

Lesson 2
Pre-Employment Inventory and Data Sheet

OBJECTIVES

1. To increase speed in typing and shorthand
2. To review typing of business letters and envelopes
3. To discuss job information
4. To prepare a data sheet

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Building Typing Skill	Instruct the students to use Fig. 2.1, Part (A) for a typing warmup drill. This same material can be used for several 1-minute tests if you wish.
A. Warmup drill	
B. Exercises	After the warmup drill, give two 5-minute exercises, using Fig. 1.3. Have students check their better copy, circle any errors, and figure scores. Are these results better than last week's? Keep encouraging them. Suggest that they write down the words they had difficulty in typing and practice them before next week's meeting. Collect the scored copy so you can make suggestions on how they can improve.
	Suggested Teaching References: Agnew and Palmer, various pages. Rowe, various pages.
II. The Business Letter (continued)	Hand back the letters that the class transcribed in Lesson 1. Draw attention to any special problems in the letters. Ask the students if they have any questions. Use the transparency of Fig. 1.1 to illustrate how a finished letter should appear.
A. Review of previous work	
B. Punctuation	The type of punctuation used is the decision of the dictator. If he or she does not specify, then the secretary is allowed to choose. Be uniform. The style used must be consistent throughout the letter.
1. Open punctuation	Open punctuation means that in general, no punctuation is used at the end of any line (outside the body of the letter). Of course, if the line ends with an abbreviation, a period is used. Fig. 2.2 illustrates the use of open punctuation.

(A) DIRECTIONS FOR TYPING: Use a 70-space line, 5 space idention, double spaced. Type the word practice three times and the paragraphs twice.

secretarial probationary easier desirable preparation adapt attitude directions criticism scholastic superior procedures

When you obtain your first secretarial position, do not ex- 12
pect to start at the top. Most companies have a formal or infor- 25
mal training program designed to help you to advance on the job. 36
During your probationary period, you will be given the easier 50
and maybe the least desirable tasks. With experience, you will 63
be expected to perform more challenging tasks. 72

Before you were hired, your employer was aware of your 83
educational preparation; now your employer will want to see how 96
well you adapt to working with others, following directions, and 109
accepting criticism. Your attitude toward work probably was not 122
reflected in your scholastic record. 129

(B) SHORTHAND PRACTICE MATERIAL: Marked for 80 words per minute.

A person who has always been a superior student and able to work independently with minimum/ direction may find working on an office team a frustrating experience. Each business organization/ has its own preferred way of doing things and for handling special problems. Regardless of the procedures you/ learned as part of your office training, be prepared to follow the procedures required by your employer.

The/ secretary who is willing to learn new ways of doing things and to meet the preferences of her employer/ is likely to advance more readily on the job. The secretary who is willing to work with and be part/ of an office team is the type a business organization wants to retain as a permanent worker./

Figure 2.1
TYPEWRITING AND SHORTHAND PRACTICE MATERIAL
FOR LESSON 2

NEW VIEW PUBLISHING COMPANY
2455 South Lake Road West
Memphis, Tennessee 38101

April 8, 19__

Ms. Martha MacGuire
Leonardsville Central School
Leonardsville, Iowa 51018

Dear Ms. MacGuire

The authors of our latest high school typewriting textbook state that a personal business letter should be typed in the same style as a business letter with only two major exceptions.

Letterhead paper is not used for personal letters; therefore, the return address is placed above the dateline. A secretary should space down 12 lines from the top edge of the page to reach the starting point for the first line of the return address. Be sure to take into consideration the length of the lines in the return address and date line. The longest line of the return address should end near the right margin, at the point where the bell rings. Remember, the zip code must be typed after the state.

Another variation is in the complimentary close. After typing the complimentary closing, space down four lines and type your name. A woman may use Miss, Ms., or Mrs. with her typed signature; but when signing the letter in pen, the title is omitted.

Of course, the typist's initials are not used on a personal business letter. We are enclosing a booklet that illustrates some of the different styles for addressing envelopes.

Sincerely yours

Alice O'Neill, Manager
Business Education Department

dr
Enc.

Figure 2.2
BUSINESS LETTER SHOWING OPEN PUNCTUATION

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
2. Mixed (standard) punctuation	In the mixed style of punctuation, a colon is used after the salutation and a comma after the complimentary closing. No punctuation is used at the ends of lines in the inside address. The letter in Fig. 1.1 illustrates the use of mixed punctuation. A letter typed for personal business can use either style.
C. Letter placement	Placement on the page depends on the length of the letter. You will have to decide whether a letter is short, medium, or long. Generally, these rule-of-thumb guidelines are used:
1. Length of line	A letter containing less than 100 words uses a 4-inch line; a letter of 100-200 words uses a 5-inch line; for letters of more than 200 words, a 6-inch line is used.
2. Vertical placement	The firm's letterhead has to be taken into consideration when planning vertical placement. The dateline is placed two to four lines below the heading. The space between the dateline and the inside address can vary from three to six lines depending on the length of the letter. The secretary should be able to tell from her (or his) shorthand notes the approximate size of the letter to be transcribed. She should also take into consideration whether she is using pica or elite type.
D. Two-page letter	
1. Arrangement	The first page of a two-page letter is arranged the same as a one-page letter except there should be a margin of 1 to 1½ inches at the bottom of the page. If the typewriter does not have a page-end guide, mark lightly with a pencil on the sheet. The first page is typed on letterhead paper. The succeeding pages are typed on plain paper of equal quality.
2. Dividing a paragraph	Explain to the class that in dividing a paragraph at the bottom of a page, at least two lines should be left at the bottom of the page and at least two lines at the top of the following page. If this is impossible, then type the entire paragraph on the first page. Never hyphenate the last word on a page; instead type the entire word on one page.
3. The second page	Type the heading six to seven lines (approximately one inch) from the top of the second page. Leave a triple space after the heading before typing the rest of the body of the letter.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
	Two of the most commonly used headings for continuing pages are: Name Page 2 Date or: Name 2 May 19, 19__ *Suggested Teaching References:* Gavin, pp. 210, 211. House, pp. 31, 32.
E. Envelopes	Bring in samples of both legal and business-size envelopes. Use a transparency of Fig. 2.3 to demonstrate how to place the addresses on both sizes.
1. Placement of address	The general rule is that the first line of the address should be typed one line below the horizontal centerline and five spaces to the left of the vertical centerline. Type addresses single-spaced in block style for modified block style (semiblocked) letters. Draw special attention to the placement of mailing notations on the envelope. Also demonstrate how to fold letters for each size of envelope.
F. Carbon paper	Discuss various weights of carbon paper. Have samples to illustrate. Demonstrate how to assemble a carbon pack for multiple carbon copies and how to place it in the machine. Then show a sample of a one-time carbon pack. Explain the convenience and low cost of this type of pack.
G. Correction of Errors 1. Methods used	Discuss various methods by which corrections can be made including: typing eraser, correction tape, and liquid blockout. Have a sample of each and explain what each will and will not do. Also, why one method may not be satisfactory for all corrections. Discuss correction materials that match various colors for office stationery.
2. Practice	Give the class sheets containing sentences with errors that can be corrected by the following technqiues: Erasing Squeezing Spreading Reinserting and alining paper

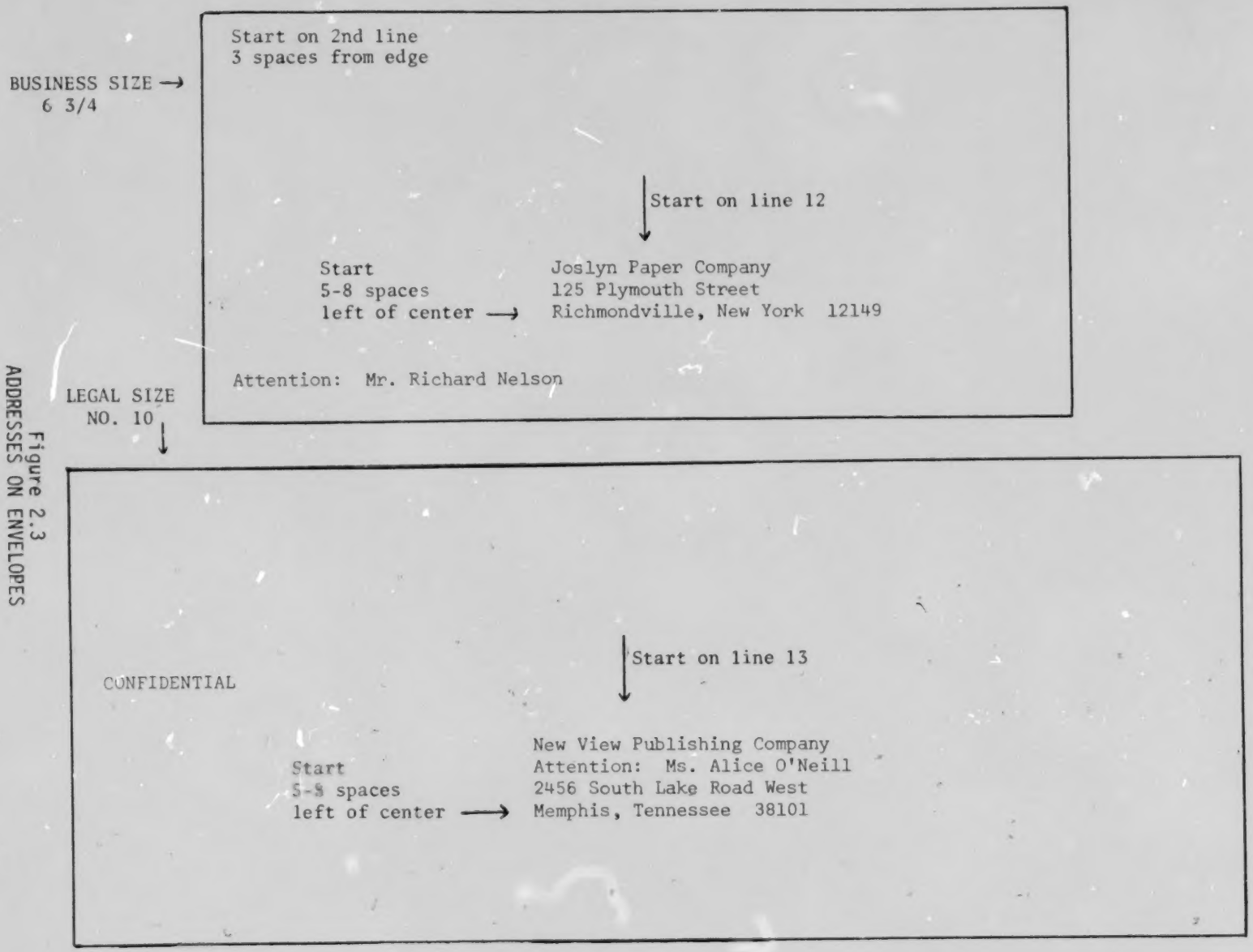


Figure 2.3
ADDRESSES ON ENVELOPES

17

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
	Demonstrate the technique of spreading and squeezing letters to make a correction.
3. Timed practice	Next, give them another sentence and time them while they are correcting the error. This will stress the time and cost involved in making errors, and the need for accuracy. Circulate around and assist those who may need assistance.
	Suggested Teaching Reference: Meehan, pp. 46-49.
III. Shorthand: Dictation and Transcription A. Warmup	Choose some familiar material for warmup practice in shorthand. Either use the letter of Fig. 1.5 or dictate part of the typing warmup from Fig. 2.1, Part (B). (This copy is marked for dictation.) Preview the most difficult words and give the dictation in 1-minute spurts, starting with a low rate and working up to the highest rate the class can take.
B. Dictation	Dictate the letter from Fig. 2.4 and ask the students to transcribe it in modified block style with open punctuation and one carbon copy.
C. Transcription	To make the exercise more realistic, you should provide letterhead paper for the transcription. The letterhead of Fig. 1.5 can be copied easily by blocking out the letter and running the sheet through a copier. Or a ditto master can be made and run off. Allow a maximum of 15 minutes for transcription. Have the class check their transcripts as you read the letter aloud.
IV. Job Information	Conduct a group discussion based on the following questions. What type of secretarial work do you feel qualified to do? Have you had any previous experience that gives you confidence in this area? What is your career goal — not today — but for tomorrow? Suggest kinds of jobs available for people with secretarial background such as: stenographer, secretary, typist, word processor, administrative secretary, and correspondence secretary. Ask the students if they know the duties of these positions. Mention to the class some of the duties and skill requirements in these positions.

13 South Broad Street
Greene, New York 13815
September 12, 19__

Box 305
MORNING SUN
East Sidney, New York 13837

Gentlemen

According to this morning's newspaper, you are looking for a top level secretary who has the/ interest and ability to train for a position as executive secretary with your firm. I believe I/ fulfill all the necessary qualifications for such a position and would like to be considered an applicant./

My grades both in high school and college were in the top tenth of my class. I received proficiency awards for my shoı hand/ (140 words per minute) and typewriting (70 words per minute) upon graduation from high school. I/ am currently attending a refresher course in Secretarial Practice and Procedures given at Clayton/ High School. This course has brought me up to date, especially in the operation of new office machines.

As you look at/ my resume, you will see that I have had an opportunity to work in a variety of situations/ and have enjoyed working with and directing workers in office procedures. As a typist in the high school, part of my/ work was serving as a receptionist, giving me an opportunity to work directly with the public.

When you/ have had time to read my resume and check my references, I should like to have an opportunity to come and/ talk with you about the position.

Sincerely yours

Marjorie Scott

Enclosure

Figure 2.4
MODIFIED BLOCK LETTER WITH OPEN PUNCTUATION
MARKED FOR DICTATION AT 80 WORDS PER MINUTE
(Syllabic Intensity 1.5)

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
A. Sources of job information	Ask your students what sources they would investigate to obtain a job.
1. Newspapers	Bring in several employment sections from local newspapers and allow the students to choose which openings they would apply for and discuss why they chose them.
a. Blind ads	Explain to the class that many companies prefer to use a box number in their employment advertising. This allows them to sort out the better applicants and avoids the problem of large numbers of applicants coming to the firm's office. Show a sample of a newspaper blind ad.
2. Employment agencies	You will find employment agencies listed in telephone books and also in newspapers. Some agencies specialize in certain professions only, but most agencies are for general employment. The job applicant usually pays a fee for this service, but in some cases the employer pays it. The fee is usually a percentage of the salary.
a. Private	
b. State Employment Service	Maintained by the State of New York, this office places both skilled and nonskilled applicants. There is no fee for this placement.
c. Placement services of schools	Members of the class who formerly attended local schools may have continuous placement service open to them from their schools.
3. Relatives and friends	Some of the best jobs are obtained through relatives and friends. Many positions are never advertised. Workers in a firm usually know of openings ahead of time and pass the word to their friends and relatives.
B. Behavior on the job	Discuss the behavior and attitudes needed on a job in general. Explain that more jobs are lost through poor attitudes than lack of skill. Have the class express their ideas on acceptable dress standards for the position of secretary. Also discuss the importance of a pleasant personality.
	Try to obtain a well-qualified personnel specialist to talk to the class. This gives a good change of pace. He or she is likely to emphasize the importance of appearance and attitudes in applying for a position and in keeping it.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
V. Personal Data Sheet	The first step in applying for a position is to gather necessary information and make up a personal data sheet.
A. Purpose	Use of a data sheet permits a short letter of application. A busy employer will not read a long letter from a prospective employee and will find a data sheet more convenient.
B. Format	On a data sheet, information is usually divided into sections. The number of sections and arrangement of the information can vary considerably. Examples of two data sheets are shown in Figs. 2.5 and 2.6.
1. Personal section	This part of the data sheet gives the name, address, age, weight, and height. If you are older and feel that putting down your age would harm your chances, do not place it on the data sheet.
2. Education	List latest schooling first. Give name of school, year graduated, and the major courses taken in the business curriculum. Also list all awards and honors. If you had further study beyond high school, be sure to include location, date, what degree you were granted, and when awarded. List any refresher courses in the business field, including this one. If you take a refresher course, it tells the employer that you are interested in keeping up to date.
3. Experience	All work experience is important whether it was after school, part-time, or full-time. State your title and also what responsibilities you had in your job. Start by listing the most recent first. It is not always what you have done but the fact that you were ambitious enough to work and to associate with the public.
4. References	Caution the class that they should ask permission of people before using their names as references. Either contact them by phone or write them a note to ask permission. Three or four references are all that are necessary. Do not use relatives. Desirable references include former employers, guidance counselors, and former teachers.

RESUME

ARLENE RANDALL
148 Locust Street
Little Lake, New York 13813

Position Desired: Secretary

EDUCATION

Graduate, 1974, Midlakes Community College
Two-year business course, AAS degree in Secretarial Science, specialized in legal stenography.
Typing speed: 70-80 words a minute
Shorthand speed: 100-110 words a minute
Skilled in operating transcribing, duplicating, and calculating machines

Graduate, 1972, Pittsford High School
Majored in business subjects

INTERESTS, ACTIVITIES, AND HONORS

College: Member of the Student Senate; Secretary, Class of 1973; Dean's list 1973-74

EXPERIENCE

Legal Secretary
July '72 to now, part-time (vacations and after school)
Thompson and Angell, Attorneys, 144 Lake Avenue, Rochester, New York 13846

PERSONAL

Birth date: February 5, 1950 Health: Excellent

REFERENCES

Mr. Jas. Thompson, Attorney
144 Lake Avenue
Rochester, New York 13846
Telephone: 456-7722

Ms. Violet Spring
1800 Pine Drive
Webster, New York 13780
Telephone: 673-8090

Dr. Alex Zeh
Midlakes Community College
Midlakes, New York 04567
Telephone: 122-345-5689

Mr. John Adams, Chairman
Business Department
Pittsford High School
Pittsford, New York 13822
Telephone: 673-3546

Figure 2.5
DATA SHEET

DATA SHEET

NAME:	Margaret Carter	HEIGHT:	5'8"
ADDRESS:	1101 Fifth Street Silver Pond, New York 14589	WEIGHT:	132 pounds
TELEPHONE:	Area Code 175-345-0987	MARITAL STATUS:	Single
AGE:	22 years	PHYSICAL CONDITION:	Excellent

EDUCATION

Graduated from Norwich Central School, Norwich, New York, on June 24, 197_, after completing a secretarial program.

Secretarial Skills:

Typewriting rate — 50 words a minute
Shorthand dictation rate — 110-120 words a minute
Transcription rate — 30 words a minute

Awards and Certificates:

Best Business Student of the Year Award, 1973 and 1974
Shorthand certificate — Five minutes at 100 w.p.m.

Office Machines Operated:

Transcription machine, stencil duplicator, spirit duplicator, adding and calculating machines

EXPERIENCE

Clerk-typist in the office of the Mutual Insurance Company, June, 197_ until present time, mostly typing policies.

Worked as part-time secretary for the Guidance Director during my junior and senior years at Norwich Central School. I worked typing stencils and doing general mailings.

REFERENCES

Miss Ruby Howe, Chairman Business Department, Norwich Central School, Norwich, New York 13815, Telephone 292-5062

Mr. Henry Taft, Mutual Insurance Company, 300 Broad Street, Oxford, New York 13809, Telephone 454-1616

Dr. Max Griven, 676 Second Street, Oneonta, New York 13121, Telephone 785-6003

Mr. Jos. Rossi, Norwich Central School, Norwich, New York 13815, Telephone 292-5162

Figure 2.6
DATA SHEET

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
C. Review of rough draft	Ask the class to prepare a rough draft of a data sheet using their personal data. They should show you the rough draft before they type the finished copy. This will give you an opportunity to make suggestions so the finished copy will be attractive to an employer.
D. Part of secretarial manual	The finished typed copy will form part of the student's secretarial manual. If the students do not have time to retype the data sheet in this session, there will be time in the next session.
VI. References	*Suggested Teaching References:* Frieš, pp. 459-561. House, pp. 29-30. Meehan, pp. 553-555.

Lesson 8
Job Application Letter

OBJECTIVES

1. To increase speed in typing
2. To discuss job application material
3. To maintain shorthand fluency

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Building Skill in Typing	Ask the class to practice paragraph A of Fig. 3.1 before giving them several 1-minute timings on the material. In the first timing, have students strive for speed and not be concerned about errors. In the second timing, have them try to beat their speed record, and in the third timing, have them drop back to a control speed for accuracy.
A. Speed, then accuracy	
B. Practice of difficult words	Before trying the two 5-minute timings from Fig. 1.3, have them practice the words on their personal list of difficult words from last week's timings. After they have typed the 5-minute timings, have them score and hand in the better copy. They are to continue to keep a record of the words that cause them difficulty. Ask them to compare the previous two week's list and see if the same characters are causing them difficulty. If so, bring in some remedial work for them to type at home.
	Suggested Teaching References: Agnew and Palmer, various pages. Rowe, various pages.
II. Job Application Material	Stress the fact that the first impression is a lasting impression. The future employer receives his first impression from your letter of application and data sheet. These can serve to say "welcome" or "goodbye" to an excellent opportunity. You are applying for work as a secretary and your application material is representative of the type of work you would be sending out for the firm. If the quality of work shown in the letter of application and data sheet does not measure up to the standards of the firm, you might not be called in for an interview.
A. Opening the door	

(A) DIRECTIONS FOR TYPING: Set a 70-space line, 5-space indention, DS. Type the word practice three times and the paragraphs twice.

personnel attractive interview requirement probationary performance grooming qualifications responsible appointed emphasizes

Appearance is one of the deciding factors in hiring employees. 12
This is especially true in selecting secretaries and other office 25
employees who meet the public regularly in the course of their work. 39

Regardless of what you may hear, just any style of dress is not 52
acceptable in most business offices. Personnel directors relate that 66
appropriate employee dress and general appearance are of major impor- 80
tance. They must choose workers who will be acceptable to the depart- 94
ments to which they will eventually be assigned. 104

(B) SHORTHAND PRACTICE MATERIAL: Marked for 80 words a minute.

Applicants usually "spruce up" for the day of an interview; but after having been appointed to a/ position, they tend to feel that an attractive appearance is no longer a job requirement. This is a serious/ mistake.

During a probationary period, part of a personnel director's job is to maintain/ contact with the immediate supervisor of each new employee. The job performance of the new worker,/ as well as the worker's appearance and ability to work well with associates,/ is reviewed. One personnel/ director emphasizes that "pride in dress reflects pride in work." An employee should realize that attention/ to dress and personal grooming are part of the job qualifications of every responsible,/ efficient secretary.

Figure 3.1
TYPEWRITING AND SHORTHAND PRACTICE MATERIAL
FOR LESSON 3

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
B. Review of data sheet	Have the students look at the personal data sheets they prepared previously. Review briefly the parts of a data sheet, clearing up any questions about its preparation. You might do this by using transparencies of Figs. 2.5 and 2.6.
C. Letter of application	A letter of application is written to obtain an interview. It is a short letter accompanying the data sheet to introduce you to the firm. An example is shown in Fig. 3.2.
1. Purpose	
2. Contents	The necessary elements include: First paragraph: Specify the position you are applying for, how you learned about the opening, that you wish to be considered an applicant. Second paragraph: Emphasize why you are interested in joining the firm from the standpoint of what you can do to help them achieve their goals, rather than because they have good employee benefits. Third paragraph: Emphasize certain qualifications that make you eligible for the position. Select your most outstanding qualifications from the data sheet. Last: Request an interview. Give the telephone number where you can be reached as well as when you will be there to receive the call.
3. Typing the letter	Either modified block or semiblocked form can be used in typing the letter. Following are a few essential points to remember:
a. Return address	•Include your complete return address above the date line, for example: 36 Maple Lane Rochester, New York 12145 May 24, 1974
b. Salutation	•If you are writing to a box number, the salutation is: Gentlemen:
c. Closing	•After typing the last paragraph, type the complimentary closing and skip four lines before typing your name.
d. Title	•Your typed name may be preceded if you wish with Ms., Mrs., or Miss.

148 Locust Street
Little Lake, New York 13813
September 24, 19__

Mrs. Jane Dickens
Director of Personnel
Zabor Corporation
1483 Longridge Road
Rochester, New York 14600

Dear Mrs. Dickens:

A friend of mine, Marjorie Cass, told me that there is going to be a secretarial/ opening in your legal department. I would like to be considered for the position.

I was graduated/ from Midlakes Community College in June with an Associate degree in Secretarial Science./ In my second year I took several law courses and selected legal stenography as my specialized/ shorthand field.

My interest in legal stenography grew from having a part-time position with Thompson and/ Angell, Attorneys. I have worked for that firm from July 1, 1972 until the present time, filling in/ during vacations and after school.

I feel that I am well qualified to hold the position that is being/ vacated in your firm. I am enclosing my data sheet for you to evaluate my record.

When may I/ come to talk to you about the position? My employer knows I am applying for this position, and I/ can arrange to come for an interview at your convenience. My telephone number at the office is/ 456-8900. At home, where I can be reached after six, it is 234-4455.

Sincerely yours,/

Arlene Randall

Enclosure

Figure 3.2
LETTER OF APPLICATION
MARKED FOR DICTATION AT 80 W.P.M.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
e. Signature	•Always sign your name with pen and omit your title. Be sure you write legibly.
D. Final check of material	In writing an application letter, prepare a rough draft first, reread it, then type the final copy. Check both your letter and data sheet carefully. If you have to make a correction, be sure it is not noticeable to the reader.
	Suggested Teaching References: Fries, pp. 462-464. Meehan, pp. 55-557. Stewart, pp. 462-472. Woodward, pp. 120-121.
III. Shorthand Dictation	Using the letter that was transcribed in Lesson 2 as familiar material, dictate 1-minute sections.
A. Speed building	Start with a comfortable speed and then dictate the same material again increasing the speed by 10 words. If half the class is able to take it, increase the speed by another 10 words. Repeat until you find that only a few are getting the dictation; then dictate it again at a lower speed.
1. Spurts for practice	Try the next section using 1-minute spurts, encouraging students to write something down.
	Occasionally have someone read back. This provides an opportunity for the class to rest their hands and gives you a chance to check on the dictation. Then join together the two or three one-minute dictations that have been practiced. Push for speed.
B. Dictation and transcription	Dictate to the class the sample letter in Fig. 3.3. This is to be transcribed after the data sheet and letter of application are typed.
	If students do not get the letter transcribed this session, it can be used for practice in reading from "cold notes" in the next session.
IV. Filling Out Job Application Blanks	Obtain two or three samples of application blanks. Prepare transparencies of them. Also duplicate one to give to the students to take home, fill in, and return at the next session.
A. Information content	Using a transparency, go over the information sought of the applicant. Point out that the application blank seeks much of the information that is on their data sheets. Therefore, it is helpful to take a copy of a data sheet along when going for an interview.

EVANS MANUFACTURING COMPANY

1415 Lexington Avenue
New Lakeland, Florida

1788 Whiliams Street
Rochester, New York

May 14, 19__

Mr. Harold Gregory, Placement Director
Remington Business College
1200 St. Paul Street
Rochester, New York 14601

Dear Mr. Gregory

Due to the expansion of our facilities, we have openings for three beginning/ secretaries. We prefer people with a good basic background in business education. Their skills should include/ the ability to take shorthand dictation at 100 words per minute and to type at 60 words per/ minute.

All beginning secretaries are placed first in our job orientation program and — depending on/ their abilities, attitudes, and skills — will be moved after a few weeks to other departments.

As you know, our/ pay scale and employee benefits are the highest in this area. We also offer the opportunity/ for our workers to attend the evening session of Rouson College tuition free.

We are hoping that you/ will be able to send us three secretaries with the same excellent qualifications as those you have/ recommended in the past.

If you will have the applicants telephone me between 10 a.m. and 3:30/ p.m. on Monday or Tuesday, I will be able to schedule them for an interview later in the week.

Sincerely yours/

Jeanne Miller
Director of Personnel

aj

Figure 3.3
LETTER FOR DICTATION
MARKED FOR DICTATION AT 80 WORDS PER MINUTE

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
	Discuss the types of information sought by the employer and the reasons for seeking such information.
B. Read instructions	Caution the students to read instructions carefully before filling out blanks. Each firm has its own style of application blank and directions for how it is to be filled out. If the blank says PRINT, do it, don't write by hand. Warn students to use their best handwriting if handwriting is asked for on the blank. Check all spelling.
C. Be truthful	Be truthful in all information put down. Remember that all of this will be checked. Carry your Social Security number with you. This is a *must* in applying for a job. If a question does not apply to you, draw a line through the space where the answer would be placed. This indicates that you read the question and it does not pertain to you. If the application blank asks for typing of the answers, do it neatly. If possible, use elite type. Use the variable line spacer so your reply will fall on, or a little above, the line. Correct errors neatly; this is an example of your secretarial proficiency. *Suggested Teaching References:* Blackledge, pp. 49-78. Lessenberry, *Century 21*, p. 252.

Section 2:

The Secretary in a Law Office

Lesson 4
The Contract of Sale and the Lease

OBJECTIVES

1. To build skill in typing and shorthand
2. To cover general rules in the physical preparation of legal documents
3. To discuss the typing of a Contract of Sale and a Lease

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Skill Building	Duplicate the typing warmup drill from Fig. 4.1 so each student will have a copy. Use same typing copy for all four lessons (4 through 7) dealing with work in a legal office. This will give the students an opportunity to build up their speed. Also, you might want to give the class two or three 1-minute drills and then two 5-minute tests on the material of Fig. 4.2.
A. Typing	
B. Shorthand	The material of Fig. 4.2 is repeated in Fig. 4.3 but marked for shorthand dictation at 100 words per minute. However, you can dictate this material office style, that is, not at a consistent speed, but fast and slow and making an error here and there and then correcting it. If you do this, then you should review with the class how to make corrections in shorthand notes so they can read them back readily and easily.
II. Physical Preparation of Legal Documents	Accuracy is essential in all secretarial work but especially so in legal secretarial work where binding contracts are written. All work must be correct.
A. Accuracy	
B. Standardized fill-in forms	Many offices obtain legal forms at a stationery store. Attorneys usually order forms direct from supply houses or have their own printed. Preprinted fill-ins are used more today as they save a great deal of the secretary's typing time.
C. Dictated copy	Much of the work that a legal secretary does is not the type that will fall in the "fill-in category." Where the terms or the descriptions are too long or involved to fit into a standardized form, the secretary should either type this information as addendums (to attach to the form) or type the whole document on *legal cap* ($8\frac{1}{2}$ x 13 or 14 paper).

DIRECTIONS FOR TYPING: Use a 70-space line, 5-space indention, DS.

(A) A Contract of Sale is the first legal paper prepared in the selling of real estate. It binds both the seller and purchaser to the agreement as set forth in the contract. It tells the date, property to be sold, brief description of the property, consideration, terms, and names and addresses of the parties to the contract. 13 26 40 53 64

By signing this contract the purchaser knows the amount of money that he needs and that it will be the same amount as that agreed upon when the final papers are signed. The time lapse between the signing of the Contract of Sale and the passing of the deed allows the purchaser time to secure a mortgage and the lawyer time to prepare a search of title to the land. 77 91 105 119 132 136

(B) Power of Attorney is a legal document prepared when you wish to authorize a person to act as your agent. This document may be prepared on a standardized form or it may be typed on legal cap. It simply states the name of the person who is granting to his agent the legal right to carry on his business for him. A Power of Attorney may be limited as to the acts that the agent may perform and for a fixed period of time, or it may be a general one allowing the agent to handle his entire business affairs for an unlimited period of time. It must be signed by the grantor in the presence of a notary. 13 27 40 54 67 81 95 109 119

(C) Three legal forms that are usually prepared in the transferring of real estate are the deed, the mortgage, and the bond. A deed shows the transferring of the property from the seller to the buyer. It contains the names and addresses of the seller and the buyer, a description and location of the property being transferred, and it is signed in the presence of witnesses and a notary public. 13 27 41 55 69 75

(D) If the property is being paid for entirely in cash and the buyer does not need to secure a mortgage from a lender to pay for the property, the deed is the only paper that must be prepared. In most real estate transactions the purchaser needs to borrow money and, in evidence of the debt, he gives a mortgage and a bond. They are made out to the lender or lending institution. 12 27 41 55 69 75

(E) It is desirable that all individuals over the legal age have a last will and testament if they own any "worldly goods." Anyone who dies without leaving a will is allowing the courts to dispose of his estate. 12 26 40 41

In preparing a will you are stating to whom you wish your assets to go and giving other special last instructions that you may wish to have carried out in the disposal of your estate. You appoint a person called an executor or executrix to carry out your last requests. 55 69 83 96

A will should be witnessed and signed in the presence of a notary public. 109 110

Figure 4.1
TYPING WARMUP DRILLS FOR LESSONS 4, 5, 6, and 7

LEGAL SECRETARY

Being a legal secretary is one of the most interesting but also one of the most demanding positions in the secretarial field. 25

A good legal secretary must be a paragon of business virtue. To the outside world any secretary must be gracious and calm in spite of the pressures of the position. Outward appearance and mental attitude must present to the public an attractive, efficient, well-organized individual. The secretary is the first person contacted by most clients, either by phone or in person. The first impression is a lasting one. 109

In the office, a legal secretary, besides possessing a high degree of skill in shorthand and transcription, must have a good command of the English language, knowledge and understanding of legal forms and procedures, and a real interest in law. A legal secretary may also be called upon to demonstrate managerial abilities, perhaps including the management of the office in the absence of the legal staff. 190

Before attaining the title of legal secretary, a secretary usually works with other legal secretaries for three or four years. This, of course, depends on the knowledge she has acquired through formal course work. Legal secretaries who are interested in furthering their careers join the National Association of Legal Secretaries. This association gives professional status to the position by sponsoring, through its chapters, training programs, a Professional Legal Secretary examination and certification program, and an employment service. 299

Behind every successful lawyer there is a very efficient and highly qualified professional legal secretary. 321

Figure 4.2
5-MINUTE TIMED WRITING

LEGAL SECRETARY

Being a legal secretary is one of the most interesting but also one of the most demanding positions in the/ secretarial field.

A good legal secretary must be a paragon of business virtue. To the outside world any secretary must/ be gracious and calm in spite of the pressures of the position. Outward appearance and mental attitude must present to the public an/ attractive, efficient, well-organized individual. The secretary is the first person contacted by most clients, either by phone/ or in person. The first impression is a lasting one.

In the office, a legal secretary, besides possessing a high degree of/ skill in shorthand and transcription, must have a good command of the English language, knowledge and understanding of legal forms and procedures,/ and a real interest in law. A legal secretary may also be called upon to demonstrate managerial abilities,/ perhaps including the management of the office in the absence of the legal staff.

Before attaining the title of legal secretary,/ a secretary usually works with other legal secretaries for three or four years. This, of course, depends on the knowledge she/ has acquired through formal course work. Legal secretaries who are interested in furthering their careers join the National Association/ of Legal Secretaries. This association gives professional status to the position by sponsoring, through its chapters,/ training programs, a Professional Legal Secretary examination and certification program, and an employment service./

Behind every successful lawyer there is a very efficient and highly qualified professional legal secretary./

Figure 4.3
SHORTHAND DICTATION PRACTICE
MARKED AT 100 W.P.M.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS *Suggested Teaching References:* Fries, pp. 6-8. Meehan, pp. 573-575.
1. Paper — legal cap	Legal-sized paper, which is $8\frac{1}{2}$ inches by 13 or 14 inches, is used for most documents, although some offices are starting to use $8\frac{1}{2}$ by 11. The printed fill-in forms are changing to the shorter size and this may have an influence on the future length of legal paper, referred to as *legal cap*. Microfilming of records is also influencing the trend toward $8\frac{1}{2}$ by 11 paper. Some time in the future it is likely that both sizes of paper mentioned above will be replaced by a metric size, 210mm x 297mm, equivalent to approximately $8\frac{1}{4}$" x $11\frac{3}{4}$". This is the A4 metric standard for paper adopted by the International Organization for Standardization.
2. Margins	When it is necessary to set up your own sheet, you can rule a double vertical line $1\frac{3}{8}$ inches from the left margin and a *single* vertical line $\frac{3}{8}$ inch from the right margin.
3. Page numbers	Pages are numbered in the center, one inch from the bottom, beginning with page 2. The page number is usually placed between two hyphens.
4. End of a page	When the copy does not fill the entire page, the last line is ruled in a "z" fashion (See Fig. 5.1.) to indicate that the copy is continued on the next page. In continuing from page to page, the last page must have at least two lines of copy above the signatures to be legal. This prevents transferring of a page of signatures.
5. Abbreviations	Avoid the use of all abbreviations except the very common ones.
6. Multiple copies	Several copies are needed whenever a legal document is prepared. Those to be signed are called: original, duplicate original, and triplicate original. The same weight of paper may be used for all copies. The file copy may be on colored paper or on a lighter weight paper than the originals.
D. Typing the documents	Pica type is preferred, and double spacing is usual. The title or first line starts 2 inches below the top of the sheet. The center heading is solid capitals and is followed by triple spacing. Most paragraphs are indented 10 spaces. Do not end a page with a hyphenated word and always take at least two lines to the next page. Type all copy *within* the vertical rulings.
1. General rules	

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
2. Quoted material	Indent quoted material 5 or 10 spaces from the left margin. Make the right margin and paragraph indentation as you choose.
3. Carbon copies	In using carbon copies, be sure all copies are alined so the typing will line up with the printed text.
4. Corrections	Check with your employer to see which copies can or cannot be corrected. All corrections must be done neatly so they are not discernible to the reader of the document.
E. Preparation for delivery 1. Backing sheet	After being typed the document is bound with heavy blue paper called *legal backing sheet*. This sheet is folded down from the top 1¼ inches to form a flap.
a. Endorsement	In order to prepare the backing sheet for typing the endorsement: •Bring the bottom of the sheet to the top and crease; •Bring the center fold to the top and crease again; •Type endorsement on back of the second quarter from the top. The endorsement consists of a brief statement concerning contents. You should have legal cap and a legal backing sheet to demonstrate to the students.
b. Binding	Unfold the backing sheet, insert the legal document under the flap, and staple it at the top. Refold the original fold of the backing sheet.
2. Approval	Submit all finished copies to the attorney before transmitting them to the parties involved.
	Suggested Teaching References: Fries, pp. 588-602. Lessenberry, *Century 21*, p. 401. Meehan, pp. 161-169. Rowe, ppp. 227-228.
III. Contract of Sale	
A. Purpose	The purpose of a *contract of sale* is to bind an agreement between the seller (party of the first part) and the buyer (party of the second part). Usually a standardized form is used for this purpose, but in some instances the attorney prefers to dictate the information needed for this document.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
B. Contents	A contract of sale should include: date, names and addresses of the parties, location and description of the property, the consideration and terms, when the sale is to be completed, signatures of the parties and witnesses. Fig. 4.4 is a sample of a typed contract of sale.
IV. Lease	A *lease* is an agreement between two parties whereby the party of the first part allows the party of the second part to use or occupy one of his possessions.
A. Purpose	Generally, leases refer to real property; but they can involve equipment, cars, or other personal property.
B. Contents	A lease is usually typed on a standard form, containing the following information: •Names and addresses of parties •Location and description of the property •Length of time lease is to run, including beginning and ending dates •Signatures of parties and witnesses
C. Endorsement	The endorsement is typed on the outside of the lease for quick reference. As the items are listed, the secretary just fills in the blanks, taking the information from the document itself. Obtain a standard lease form from a stationery store or a lawyer's office, or make a transparency of Fig. 4.5. This figure illustrates a standard form that has been filled in with the essential information. Fig. 4.6 is a blank lease form. *Suggested Teaching References:* Leslie and Coffin, pp. 1-74. Rosenberg, pp. 410-414, 419-430.

NOTE: Legal forms in this lesson and some in later lessons have been reprinted with permission of National Legal Supply, Inc., Albany, New York.

CONTRACT OF SALE

This agreement entered into the 15th day of March, 1974, between Cyrus B. Jones and Mary L. Jones (brother and sister), Town of Squiresville, County of Chenango, State of New York, parties of the first part, and Robert C Cythe, Town of Dallas, County of Spencer, State of New York, party of the second part.

Witnesseth: The parties of the first part have offered to sell their property located in the Town of Squiresville to Robert C. Cythe. Said property consists of a two-family brick house and double garage located at 8 Summit Street, Town of Squiresville.

In consideration for which Robert C. Cythe promises to pay a purchase price of twenty-six thousand dollars ($26,000), one thousand dollars ($1,000) to be paid upon the signing of this contract and the balance of twenty-five thousand ($25,000) to be paid on delivery of the deed. Such delivery to take place within thirty (30) days from the date of this contract.

In witness whereof the said Cyrus B. Jones and Mary L. Jones, parties of the first part, and Robert C. Cythe, party of the second part, have hereunto set their hands this 15th day of March in the year of our Lord one thousand nine hundred and seventy-four.

_____
Cyrus B. Jones

_____
Mary L. Jones

_____
Robert C. Cythe

Figure 4.4
TYPED CONTRACT OF SALE

LEASE—SHORT FORM

This Agreement,

Made the fifth *day of* April *in the year*

Nineteen Hundred and seventy-four

Between Daniel Zoezoski of the Village of Mexico, County of Ulster, State of New York

of the first part, and

Martin Hellizer of the Town of Andes, County of Delaware, State of Maine

of the second part.

Witnesseth, *That the said party of the first part has agreed to LET, and hereby does LET to the said party of the second part, and the said party of the second part has agreed to TAKE, and hereby does TAKE from the said party of the first part, the following premises, viz:*

A six-room apartment, number 24 in the Holley Lane Apartment Complex, located on Grecian Drive, Village of Mexico, County of Ulster, State of New York,

with the privileges and appurtenances for and during the term of from the 1st *day of* May *, 19* 74

which term will end two years later on April 30, 1976.

And the said party of the second part covenants that he will pay to the party of the first part for the use of said premises, the monthly *rent of* Two hundred----------*Dollars* ($ 200.00), *to be paid* on the first day of each month at the office of the party of the first part, and a security payment of one month's rent, which will be refundable at the termination of the lease provided there is no damage other than regular wear to the property.

And Provided Further *if said party of the second part shall fail to pay said rent, or any part thereof when it becomes due,*

it is agreed that said party of the first part may sue for the same, or re-enter said premises, or resort to any legal remedy.

Figure 4.5A
LEASE
First Side

The party of the second part covenants that at the expiration of said term he will surrender up said premises to the party of the first part in as good condition as now, necessary wear and damage by the elements excepted.

Witness *the hands and seals of the said parties, the day and year first above written.*

In Presence of

Daniel Zoezoski L.S.

Martin Hellizer L.S.

Figure 4.5B
LEASE
Second Side

Lease

Daniel Zoezoski

TO

Martin Hellizer

Dated April 5, 19 74

PREMISES Holley Lane Apt., Grecian Drive

Begins May 1, *A.D. 19* 74

Expires April 30, *A.D. 19* 75

Rental $ 200.00 *per* month

Payable Daniel Zoezoski's office

42 51

FORM 83 LEASE—SHORT FORM

This Agreement.

Made the *day of* *in the year*

Nineteen Hundred and

Between

of the first part, and

of the second part.

Witnesseth, *That the said part of the first part ha agreed to LET, and hereby do LET to the said part of the second part, and the said part of the second part ha agreed to TAKE, and hereby do TAKE from the said part of the first part, the following premises, viz:*

with the privileges and appurtenances for and during the term of

from the day of , 19

which term will end

And the said part of the second part covenant that he will pay to the party of the first part for the use of said premises, the rent of

Dollars ($), to be paid

Figure 4.6A
BLANK LEASE FORM
First Side

And Provided Further *if said part of the second part shall fail to pay said rent, or any part thereof when it becomes due,*

it is agreed that said party of the first part may sue for the same, or re-enter said premises, or resort to any legal remedy.

The part of the second part covenant that at the expiration of said term he will surrender up said premises to the party of the first part in as good condition as now, necessary wear and damage by the elements excepted.

Witness *the hands and seals of the said parties, the day and year first above written.*

In Presence of

L.S.

L.S.

Figure 4.6B
BLANK LEASE FORM
Second Side

Lease

TO

Dated, 19

PREMISES

Begins A.D. 19

Expires A.D. 19

Rental $ per

Payable

Lesson 5
Abstract of Title, Power of Attorney, Bill of Sale

OBJECTIVES

1. To increase skill in typewriting
2. To learn how to type an Abstract of Title, a Power of Attorney, and a Bill of Sale

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Skill Building A. Typing	Have the students practice on material of Fig. 4.1B, about the *Power of Attorney*. After giving three 1-minute tests on this paragraph, pushing for speed, return to control. Repeat. Encourage those who have improved, and make suggestions for the others to work on. Give two 5-minute tests from copy of Fig. 4.3. Have the students hand in the better copy after they have circled their errors. Remedial drills can then be presented to help students to improve their accuracy.
II. Abstract of Title A. Background	This document is commonly called a *search*. In preparing it the researcher traces the history of the property back about 40 years. Its purpose is to protect the buyer from buying real estate that has unpaid taxes, liens, or other encumbrances against it. It must be brought up to date each time the property is sold.
B. Typing	In the Abstract of Title (or Search), each change of title is typed on a separate sheet. It is double-spaced and on legal paper. You can prepare a transparency using Fig. 5.1 as a master. As on all legal documents, you space down 2 inches from the top of the paper. Type the name of the source document at the left margin, as follows: Warranty Deed No. 1. Then add, as below: Etta Akins — Dated Sept. 16, 1931 Cons. $2,200.00 to — Ack. Sept. 16, 1931 Rec. Sept. 19, 1931-9:00 AM Robert Lake — Book 203 of deeds, page 10

Warranty Deed No. 2
Gregory Jenks and
Bessie S. Jenks,
his wife
to
Josephine Dibble

Dated April 2, 1923
Cons. $5,000.00
Ack. April 2, 1923
Rec. May 22, 1936--9 am
Book 208 of deeds, page 73

Conveys:

All that certain piece or parcel of land situated in the Village of Squiresville, New York, and generally bounded and described as follows: The boundary line begins in the center of West Main Street of said village, and runs from thence in a southerly direction parallel with the foundation of the "Johnson House," and runs three feet therefrom until said line strikes a point in a continuation of the South line, running nearly East and West, along the land of A. Z. Maines and John Tyrie; then in a Westerly direction on a continuance of said Maines and Tyrie line to a point where it strikes the lands of said A. Z. Maines; thence Northerly along the lands of said Maines to the center of said Main Street, thence along the center of said Main Street to the place of beginning, containing about one-half acre of land, more or less.

Figure 5.1
A PAGE FROM AN ABSTRACT OF TITLE

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
C. Explanation of parts	The second column starts at the center of the page. The first party named is the seller and the second the purchaser. The date that the paper is made out and the consideration paid, also the date possession takes place, and the date and time received by the county clerk for recording are added.
III. Power of Attorney	A *Power of Attorney* can be prepared on a standard form or by typing the information on legal paper. Like most legal manuscripts, it is double spaced.
A. Notary form	If it is a typed copy of a Power of Attorney, the secretary must affix the paragraph under which the Notary Public will sign when the person appears before him. The legal secretary in many law offices is a notary public. In any office which handles a volume of legal work, at least one of the secretaries is a notary public.
B. Typed example	An example of a typed Power of Attorney appears in Fig. 5.2. This can be duplicated so each student can have a copy, or it can be made into a transparency. The preprinted short form (standardized) is shown in Fig. 5.3.
IV. Bill of Sale	A *Bill of Sale* is used in the sale of personal property. It lists the names and addresses of the seller and buyer. It also describes: the articles being sold, the terms of payment, and the amount of consideration agreed to. It also requires the signatures of the seller and buyer.
A. Fill-in form	A Bill of Sale can be typed in its entirety by the secretary but common practice is to use a fill-in form. An example of the fill-in short form is shown in Fig. 5.4.
	Suggested Teaching References: Fries, pp. 305-308. Rosenberg, pp. 145-148, 205, 420. Rowe, Vol. I, pp. 244, 245. Vol. II, p. 263.

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS, That I, JONATHAN CREEK, of Squiresville, New York, have made, constituted, and appointed, and by these presents do make, constitute, and appoint LEON LENS, of Squiresville, New York, my true and lawful attorney for me and in my name, place, and stead, and for my use and benefit, to act as my general agent in the management of my property, giving and granting unto my said attorney full power and authority to do and perform all and every act and things necessary whatsoever requisite and necessary to be done in said management as fully, to all intents and purposes, as I might or could do if personally present, with full power of substitution and revocation, hereby ratifying and confirming all that my said attorney or his substitute shall lawfully do or cause to be done by virtue hereof.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this twentieth day of April, 19__.

SIGNED, SEALED AND DELIVERED in the presence of

_____ (Seal)
Jonathan Creek

_____

_____

STATE OF NEW YORK

County of Chenango

BE IT KNOWN that on the twentieth day of April 19__, before me, Robert Roberts, duly commissioned and sworn as a Notary Public in and for the State of New York, personally appeared Jonathan Creek, known to me to be the same person described in and who executed this Power of Attorney, and he acknowledged this Power of Attorney to be his voluntary act and deed.

IN TESTIMONY WHEREOF, I have hereunto subscribed my name and affixed my seal of office, the day and year last above written.

_____
Robert Roberts
Notary Public in and for the County of Chenango, State of New York

My commission expires June 30, 1990.

Figure 5.2
POWER OF ATTORNEY
TYPED FORM

State of New York
County of Chenango
Town **of** Squiresville

SS.:

On this sixth *day of* April *Nineteen Hundred and* seventy-four *before me, the subscriber, personally appeared*

Jonathan Creek

to me personally known, and known to me to be the same person described in and who executed the foregoing Power of Attorney, and he acknowledged to me that he executed the same

My commission expires March 30

Notary Public for the State of New York
Residing in Chenango *County*

Figure 5.3A
POWER OF ATTORNEY
First Side

Power of Attorney
STATUTORY SHORT FORM

JONATHAN CREEK

TO

LEON LENS

Dated, April 6, 19 74

JACK S. DRAKE
ATTORNEY AT LAW
RICHMONDVILLE, NEW YORK 12149

Statutory Short Form of General Power of Attorney (Rev. 12/67)

Notice: The powers granted by this document are broad and sweeping. They are defined in New York General Obligations Law, Article 5, Title 15, sections 5-1502A through 5-1503, which expressly permits the use of any other or different form of power of attorney desired by the parties concerned.

Know All Men by These Presents, *Which are intended to constitute a GENERAL POWER OF ATTORNEY pursuant to Article 5, Title 15 of the New York General Obligations Law:*

That I Jonathan Creek of the Town of Squiresville, County of Chenango, State of New York

do hereby appoint Leon Lens of the Town of Squiresville, County of Chanango, State of New York (insert name and address of the principal)

(insert name and address of the agent, or each agent, if more than one is designated)

my attorney -in-fact TO ACT *

First *In my name, place and stead in any way which I myself could do, if I were personally present, with respect to the following matters as each of them is defined in Article 5 Title 15 of the New York General Obligations Law to the extent that I am permitted by law to act through an agent:* *

To strike out any subdivision the principal must draw a line through the text of that subdivision AND write his initials in the box opposite.

(A) real estate transactions;	[ ]
(B) chattel and goods transactions;	[ ]
(C) bond, share and commodity transactions;	[ ]
(D) banking transactions;	[ ]
(E) business operating transactions;	[ ]
~~*(F) insurance transactions;*~~	[ ]
(G) estate transactions;	[ ]
~~*(H) claims and litigation;*~~	[ ]
~~*(I) personal relationships and affairs;*~~	[ ]
~~*(J) benefits from military service;*~~	[ ]
(K) records, reports and statements;	[ ]
(L) all other matters;	[ ]

Figure 5.3B
POWER OF ATTORNEY
Second Side

Second *With full and unqualified authority to delegate any or all of the foregoing powers to any person or persons whom my attorney -in-fact shall select.*

In Witness Whereof, *I have hereunto signed my name and affixed my seal this* sixth *day of* April , *19* 7a

Jonathan Creek (L.S.)
Signature of Principal

* If more than one agent is designated and the principal wishes each agent alone to be able to exercise the power conferred, insert in this blank the word "severally". Failure to make any insertion or the insertion of the word "jointly" will require the agents to act jointly.

State of New York } ss. On this sixth day of April
County of Chenango } Nineteen Hundred and seventy-four
before me, the subscriber, personally appeared

Dorothea W. Martin

to me personally known and known to me to be the same person described in and who executed the within Instrument, and she acknowledged to me that she executed the same.

Notary Public

In Witness Whereof, the party of the first part has caused its corporate seal to be hereunto affixed, and these presents to be signed by its duly authorized officer this day of Nineteen Hundred and

By

State of New York } ss. On this day of
County of } Nineteen Hundred and
before me personally came

to me personally known, who, being by me duly sworn, did depose and say that he resides in that he is the of the corporation described in, and which executed, the within Instrument; that he knows the seal of said corporation; that the seal affixed to said Instrument is such corporate seal; that it was so affixed by order of the Board of Directors of said corporation; and that he signed h name thereto by like order.

Figure 5.4A
BILL OF SALE
First Side

Bill of Sale

TO

Dorothea W. Martin

Dated, April 6, 19

Filed, 19

51

JACK S. DRAKE
ATTORNEY AT LAW
RICHMONDVILLE NEW YORK 12149

BILL OF SALE (IND. OR CORP.)

Know all Men by these Presents

That Dorothea W. Martin

of the first part, for and in consideration of the sum of two thousand two hundred ($2,200) dollars *lawful money of the United States, to in hand paid, at or before the ensealing and delivery of these presents, by*

Agnes O'Conor

of the second part, the receipt whereof is hereby acknowledged, has bargained and sold, and by these presents does grant and convey unto the said party of the second part, her executors, administrators and assigns,

Contents of the Stylish Maid Dress Shop, including merchandise and fixtures, located at 415 Stone Wall Road, Village of Squiresville, County of Chenango, State of New York.

Figure 5.48
BILL OF SALE
Second Side

To have and to hold *the same unto the said party of the second part, her executors, administrators and assigns forever. And she does for her heirs, executors and administrators, covenant and agree to and with the said party of the second part, to* **Warrant and defend** *the sale of the said Stylish Maid Dress Shop hereby sold unto the said party of the second part, her executors, administrators and assigns, against all and every person or persons whomsoever.*

Dorothea W. Martin (L.S.)

(L.S.)

Lesson 6
Transferring of Real Estate: Contract of Sale, Warranty Deed, Mortgage, and Bond

OBJECTIVES

1. To build skill in typing and shorthand
2. To study the typing of: Contract of Sale, Warranty Deed, Mortgage, and Bond

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Skill Building A. Typing	Have the class practice the material of paragraphs C and D in Fig. 4.1, which cover mortgages. Give the students three 1-minute timings on this copy. In the first timing, stress speed; in the second, control; and in the third, speed again.
B. Timed typing	After the 1-minute timings, have them type at their own speed from Fig. 4.2. Give them two 5-minute timings on this copy. Ask them if they are having trouble with the same words that they did last week. Allow them time to practice the words that give them difficulty. This is the time for you to make suggestions for remedial work based on the papers they handed in during the previous session.
II. Real Estate Documents A. Contract of Sale (Contract to convey)	The first real estate form that is used is the *intent-to-sell* form called *Contract of Sale*, which was introduced in Lesson 4. This form binds both the buyer and the seller so that neither can legally change his mind. In the time between the signing of the Contract of Sale and the actual transferring of property, a lawyer will generally
B. Abstract of Title	prepare a *Search* (Abstract of Title) which protects the buyer against liens on the property. A sample of a Contract of Sale is shown in Fig. 4.4.
C. Deed	A *Deed* must be prepared next. This form is for transferring of ownership of property to the purchaser (grantee). The consideration listed is nominal; usually "$1.00, and other good and valuable consideration" is typed in. (See Fig. 6.1.)
1. Description of property	The description of the property for the first page of the deed is taken from the Search. All documents must be signed before a notary public. A deed must also be delivered and accepted.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
	A deed should be recorded in the public register of the county in which the property is located. If a deed is not recorded, it is not valid in relation to later innocent purchasers.
D. Mortgage	In most cases the buyer has to borrow money to purchase expensive land and buildings. In such a case, a *Mortgage* is needed. A sample fill-in form is shown in Fig. 6.2.
1. Evidence of right	A mortgage is written evidence that the person or institution lending the money has a legal right to the property in case the buyer fails to make his payments. A person or institution lending the money is called the mortgagee. The mortgage is made between the borrower (mortgagor) and the lender (mortgagee).
2. Description	The mortgage contains the full description of the property, the terms of payment, and where payment is to be made. It is signed by both parties and notarized.
E. Bond	At the time the mortgage is prepared, a *Bond* is also prepared. It is a promissory note stating that the buyer is responsible for paying the debt.
1. Right of seizure	It states that the lending institution can seize the property not only for failure to make regular payments on the principal, but also for nonpayment of taxes or interest. Also for failure to keep the property properly insured. An example is shown in Fig. 6.3.
F. Satisfaction Piece	When a mortgage loan has been paid, the lender executes a document called a *Satisfaction Piece* which cancels the mortgage and removes the mortgage loan. The Satisfaction Piece should also be properly recorded to show the mortgage was properly discharged.
	Suggested Teaching References: Fries, pp. 307-308. Lloyd, pp. 31-37. Rosenberg, pp. 419-422.

U. S. Internal Revenue Stamps Affixed

$ _____

FORM 301 — WARRANTY DEED WITH LIEN COVENANT

This Indenture

Made the seventh *day of* April *Nineteen Hundred and* seventy-four

Between

Jonathan Jones, of the Town of Squiresville, Chenango County, State of New York

party of the first part, and

Lawrence Z. Quail, of the Village of Squiresville, County of Chenango, State of New York

party of the second part.

Witnesseth *that the party of the first part, in consideration of* ONE *Dollar* ($1.00) *lawful money of the United States,* and other good and valuable consideration *paid by the party of the second part, do es hereby grant and release unto the party of the second part,* his heirs *and assigns forever, all* that tract or parcel of land, situated in the town of Squiresville, County of Chenango and State of New York and generally bounded as follows: On the north by lands of Hale Acre; on the east by Summit Street in the Village of Squiresville, New York; on the south by lands of Mrs. Mable Francis, and on the west by lands formerly used as a Burying Ground and owned by the Village of Squiresville, containing about one-half acre of land, more or less.

Excepting and reserving on the south side of said premises a right of way eight feet wide to travel over from said Summit Street, and extending westerly as far as the Southwest corner of the Dwelling house on said premises, as conveyed to Mrs. Mable Francis, June 1, 1965. Said right of way to be used in common and to be maintained equally by each party.

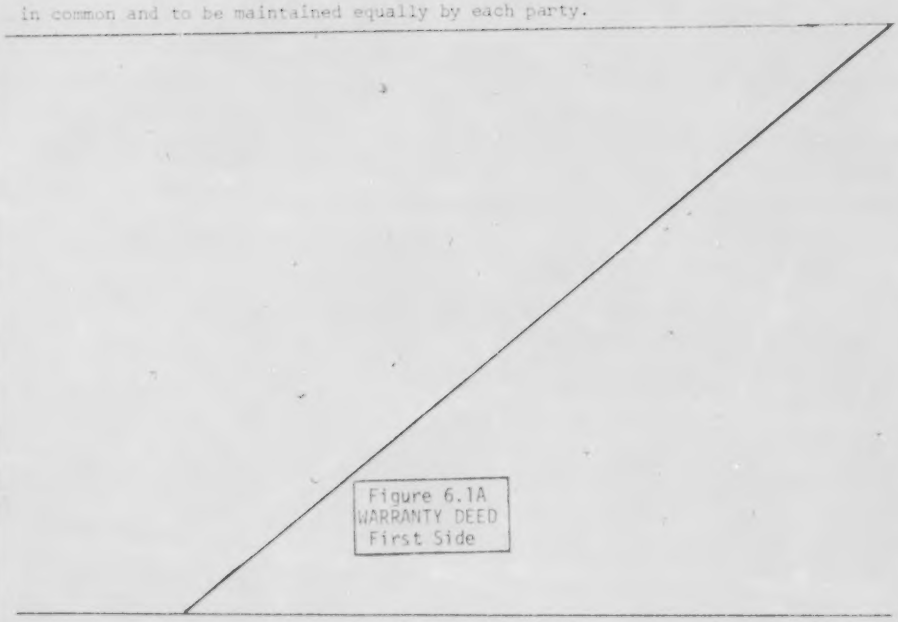


Figure 6.1A
WARRANTY DEED
First Side

Together *with the appurtenances and all the estate and rights of the party of the first part in and to said premises,*

To have and to hold *the premises herein granted unto the party of the second part, and assigns forever.*

And *said* Jonathan Jones *covenants as follows:*

First. *That the party of the second part shall quietly enjoy the said premises;*

Second. *That said* Jonathan Jones *will forever* **Warrant** *the title to said premises.*

Third. *That, in Compliance with Sec. 13 of the Lien Law, the grantor will receive the consideration for this conveyance and will hold the right to receive such consideration as a trust fund to be applied first for the purpose of paying the cost of the improvement and will apply the same first to the payment of the cost of the improvement before using any part of the total of the same for any other purpose.*

In Witness Whereof, *the party of the first part has hereunto set his hand and seal the day and year first above written.*

In Presence of

Jonathan Jones LS

LS

LS

LS

State of New York
County of Chenango } ss.

On this seventh *day of* April *Nineteen Hundred and* seventy-four *before me, the subscriber, personally appeared*

Jonathan Jones

to me personally known and known to me to be the same person described in and who executed the within Instrument, and he acknowledged to me that he executed the same.

Figure 6.1B
WARRANTY DEED
Second Side

Deed

WARRANTY WITH LIEN COVENANT

Jonathan Jones

TO

Lawrence A. Quail

Dated, April 7 19 7-

STATE OF NEW YORK

County of Chenango ss.:

RECORDED ON THE

day of ND 19

at o'clock M.

IN LIBER of DEEDS

at PAGE examined

Clerk

Jack S. Drake
ATTORNEY AT LAW
RICHMONDVILLE, NEW YORK 12149

This Mortgage

Made the seventh *day of* April *Nineteen Hundred and* seventy-four

Between

Lawrence Z. Quail of the Village of Squiresville, County of Chenango, State of New York

the mortgagor ,and

First National Bank of Centerville, Village of Centerville, County of Schoharie, State of New York

the mortgagee .

Witnesseth. *That to secure the payment of an indebtedness in the sum of* Twenty thousand and no/100----------*Dollars,* ($20,000.00) *lawful money of the United States, to be paid* with interest at 8 1/2%, a monthly payment of two hundred and twenty-five dollars ($225.00) will be paid the first day of each month at the First National Bank of Centerville.

Figure 6.2A
MORTGAGE
First Side

according to a certain bond or obligation bearing even date herewith, the mortgagor hereby mortgage to the mortgagee

Figure 6.28
MORTGAGE
Second Side

And *the mortgagor* Lawrence Z. Quail of Squiresville

covenant with the mortgagee as follows:

First. *That the mortgagor will pay the indebtedness as hereinbefore provided.*

Second *That the mortgagor will keep the buildings on the premises insured against loss by fire for the benefit of the mortgagee ; that he will assign and deliver the policies to the mortgagee ; and that he will reimburse the mortgagee for any premiums paid for insurance made by the mortgagee on the mortgagor's default in so insuring the buildings or in so assigning and delivering the policies.*

Third *That no building on the premises shall be removed or demolished without the consent of the mortgagee*

Fourth. *That the whole of said principal sum and interest shall become due at the option of the mortgagee : after default in the payment of any installment of principal or of interest for* 30 *days; or after default in the payment of any tax, water rate or assessment for* 30 *days after notice and demand; or after default after notice and demand either in assigning and delivering the policies insuring the buildings against loss by fire or in reimbursing the mortgagee for premiums paid on such insurance, as hereinbefore provided; or after default upon request in furnishing a statement of the amount due on the mortgage and whether any offsets or defenses exist against the mortgage debt, as hereinafter provided.*

Fifth. *That the holder of this mortgage, in any action to foreclose it, shall be entitled to the appointment of a receiver.*

Sixth. *That the mortgagor will pay all taxes, assessments or water rates, and in default thereof, the mortgagee may pay the same.*

Seventh. *That the mortgagor within* 10 *days upon request in person or within* 15 *days upon request by mail will furnish a written statement duly acknowledged of the amount due on this mortgage and whether any offsets or defenses exist against the mortgage debt.*

Eighth. *That notice and demand or request may be in writing and may be served in person or by mail.*

Ninth. *That the mortgagor warrant the title to the premises.*

Tenth. *That the mortgagor will receive the advances secured by this mortgage and will hold the right to receive such advances as a trust fund to be applied first for the purpose of paying the cost of any improvement, that has been commenced upon the mortgaged premises and has not been completed at least four months before the making and recording of this mortgage, and that the mortgagor will apply the same first to the payment of the cost of improvement before using any part of the total of the same for any other purposes.*

In Witness Whereof. *this mortgage has been duly executed by the mortgagor*

In Presence of

Figure 6.2C
MORTGAGE
Third Side

Lawrence Z. Quail (L.S.)

(L.S.)

(L.S.)

(L.S.)

Mortgage

Full Covenant

Lawrence E. Quail

TO

First National Bank
of Centerville

Dated April 7, 19 74

STATE OF NEW YORK

County of Chenango ss.

RECORDED ON THE

___ day of _____ A.D. 19__

at ____ o'clock ___ M.

in LIBER ____ of MORTGAGES

at PAGE ____ and examined.

_____

CLERK

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Jack S. Drake
ATTORNEY AT LAW
RICHMONDVILLE, N. Y. 12149

RECORDING TAX RECEIPT

STATE OF NEW YORK }
County of _____ } ss.

I do hereby certify that I have received on the within Mortgage $ _____ being the amount of the Recording Tax imposed thereon and paid at the date of the recording thereof

Dated _____ 19__

_____

_____

Recording Officer of
County N.Y.

Figure 6.20
MORTGAGE
Fourth Side

State of New York }
County of CHENANGO } ss.:

On this seventh day of April Nineteen Hundred and seventy-four before me, the subscriber, personally appeared Lawrence E. Quail

to me personally known and known to me to be the same person described in and who executed the within instrument, and he acknowledged to me that he executed the same

Know all Men by these Presents

That

Lawrence Z. Quail, Village of Squiresville,

County of Chenango, State of New York

held and firmly bound unto

First National Bank of Centerville, Village of Centerville,

County of Schoharie, State of New York

in the sum of

Twenty thousand dollars ($20,000)

lawful money of the United States of America, to be paid to the said

First National Bank of Centerville, its
executors, administrators, successors or assigns: **For which payment**

well and truly to be made. I *bind* myself, my heirs, and
executors and administrators *firmly by these presents.*

Sealed *with* my *seal* *Dated the* seventh *day of*

April *Nineteen Hundred and* seventy-four

The Condition of the above obligation is such *that if the above*

bounden Lawrence Z. Quail, his

executors or administrators, shall

pay, or cause to be paid, unto the above named

First National Bank of Centerville, its
executors, administrators, successors or assigns, the just and full sum of

twenty thousand dollars ($20,000) plus interest at 8 1/2%,

to be paid in monthly installments commencing May 1, 1974.

Figure 6.3A
BOND
First Side

then the above obligation to be void, otherwise to remain in full force and virtue.

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Bond

Lawrence Z. Quail

TO

National Bank of Centerville

Dated April 7, 19 74

$ AMOUNT 20,000.00

Principal Due _____ 19__

Interest payable 8 1/2% RATE

Jack S. Drake
ATTORNEY AT LAW
RICHMONDVILLE, NEW YORK 12149

Figure 6.3B
BOND
Second Side

And it is hereby expressly agreed that the whole of said principal sum and interest shall become due at the option of the mortgagee: after default in the payment of any installment of principal or interest for days: or after default in the payment of any tax, water rate or assessment which may be levied or imposed upon the premises described in the mortgage accompanying this bond for days after notice and demand; or after default after notice and demand either in assigning and delivering the policies insuring the buildings against loss by fire or in reimbursing the mortgagee for premiums paid on such insurance, as hereinafter provided; or after default upon request in furnishing a statement of the amount due on the mortgage and whether any offsets or defenses exist against the mortgage debt, as in said mortgage provided.

And it is also agreed that the mortgagor will keep the buildings on the said premises described in the said mortgage insured against loss by fire for the benefit of the mortgagee; that he will assign and deliver the policies to the mortgagee; and that he will reimburse the mortgagee for any premiums paid for insurance made by the mortgagee on the mortgagor's default in so insuring the buildings or in so assigning and delivering the policies.

All of the covenants and agreements in the mortgage covering premises therein described and collateral hereto, are hereby made part of this instrument.

In Presence of

_____ L.S.

_____ L.S.

_____ L.S.

_____ L.S.

State of New York)
County of) ss.:
of

On this day of Nineteen Hundred and before me, the subscriber , personally appeared

to me personally known and known to me to be the same person described in and who executed the within Instrument, and he acknouledged to me that he exe[illegible] same

Figure [illegible]
BOND
This [illegible]

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RECEIVED on the within BOND the following amounts of PRINCIPAL and INTEREST

DATE OF PAYMENT			PRINCIPAL		INTEREST		INT. PAID TO			RECEIVED BY (SIGNATURE)
MONTH	DAY	YEAR	DOLLARS	CENTS	DOLLARS	CENTS	MONTH	DAY	YEAR	

Figure 6.3D
BOND
Fourth Side

Lesson 7
Last Will and Testament, Affidavit of Subscribing Witnesses to Will

OBJECTIVES

1. To increase typing speed and accuracy
2. To cover the typing of a Last Will and Testament and an Affidavit of Subscribing Witnesses to a Will

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Skill Building A. Typing	Have the class practice on paragraph E of Fig. 4.1. Allow them 2 or 3 minutes for practice then run the 1-minute timings. Next, practice the words that caused them difficulty in the 5-minute timings. After two 5-minute timings, from Fig. 4.3, have them figure their scores and compare them to the scores for Lesson 4. Praise their improvement and make suggestions for future improvement.
II. Last Will and Testament	The Last Will and Testament is very personal. As a person decides what he or she wants done with her or his effects after death, a rough copy of a will is prepared. Then the person (the testator) has an opportunity to study this rough draft and decide if it expresses his real desires. There is a certain amount of emotion connected with making a will, and it is easy to misstate an intent. Having an opportunity to look over a draft before the will is prepared in final form gives the testator a chance to make needed changes. Wills can be typed on legal paper or on a standardized form. A will may be changed any time the testator wishes to do so.
A. First paragraph	This paragraph usually states that all debts and funeral expenses are to be paid as soon as practicable after death.
B. Other paragraphs	Other paragraphs list bequests and explain disposal of assets, including the manner of disposal. For example, some assets might be sold, others might be given away to individuals or charities.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
C. Executor (or Executrix)	The last paragraph gives the name of the person the testator designates to take charge of the estate to see that the instructions in the will are carried out. More than one person may be named to this position, but it is usually only one person.
D. Witnesses	The will is signed by the testator and must also be signed by two witnesses. In addition, a notary public must affirm that the testator appeared before him or her and is known to be the person named as the testator in the will. Fig. 7.1 can be made into a transparency to assist in explaining this section.
III. Affidavit of Subscribing Witnesses	This affidavit is a separate legal form that is signed by the two witnesses. It shows that they were present at the signing of the will by the testator and that the testator signed it of his or her own free will without influence from others.
1. Held in safe place	This form is retained by the lawyer along with the original copy of the will. These documents are kept in a safe or a safe deposit box in the lawyer's custody, unless the testator wishes otherwise. An illustration of the form for the Affidavit of Subscribing Witnesses is shown in Fig. 7.2.
	Suggested Teaching References: Lessenberry, *Century 21*, p. 401. Rosenberg, pp. 431-436. Woodward, p. 167.

Last Will and Testament.

I, Susan R. Mullins *of the* Village *of* Squiresville *in the County of* Chenango *and State of* New York, *being of sound mind and memory, do make, publish and declare this my last* **Will and Testament**, *in manner following that is to say:*

First: I direct all of my just debts and my funeral expenses be paid as soon as practicable after my decease.

SECOND: I give and bequeath unto Mamie Rice, of Sloansville, Schoharie County, New York, my collection of stamps now in my home at Squiresville, New York, to be hers absolutely and forever.

THIRD: I give and bequeath to Holly Reed, the sum of Two thousand Dollars, ($2,000), if she survives me.

FOURTH: I direct that all of the assets of any going business owned by me or which I have right to dispose of at the time of my death be sold by my executrix hereinafter named, at public or private sale, as the executrix shall deem best, and the net proceeds from the sale of such business I give and bequeath to the Squires Church of Squiresville.

FIFTH: All the rest, residue and remainder of my estate, both real and personal, of every nature and wherever situate of which I may die seized or possessed, I give, devise and bequeath to Isabelle S. Tyrie of Squiresville, Chenango County, New York, to be hers absolutely and forever, if she survives me, and if she does not survive me to Jay Hady, Lakeland, New York.

Figure 7.1A
WILL
First Side

Lastly *I hereby appoint* Isabelle S. Tyrie

executrix

of this, my last Will and Testament: hereby revoking all former wills by me made

In Witness Whereof. *I have hereunto subscribed my name the* eighth *day of* April *in the year Nineteen Hundred and* seventy-four.

Susan Mullins (L.S.)

We, whose names are hereto subscribed, **Do Certify** *that on the* eighth *day of* April *19* 74

the testator above named, subscribed her *name to this instrument in our presence and in the presence of each of us, and at the same time, in our presence and hearing, declared the same to be* her *last* **Will and Testament**, *and requested us and each of us, to sign our names thereto as witnesses to the execution thereof, which we hereby do in the presence of the testator and of each other, on the day of the date of the said Will, and write opposite our names our respective places of residence.*

. residing at Squiresville, New York

. residing at Squiresville, New York

TWO WITNESSES REQUIRED

Figure 7.1B
WILL
Second Side

Will

OF

Susan R. Mullins

Dated, April 8, 1974

Jack S. Drake
ATTORNEY AT LAW
RICHMONDVILLE NEW YORK 12149

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Affidavit of Subscribing Witnesses

STATE OF NEW YORK
COUNTY OF CHENANGO } *ss:*

On this eighth *day of* APRIL *, 19*74 *, personally appeared before me, a Notary Public in and for the County of* CHENANGO *, State of New York,*

John Alexander

and

Hollis Niles

who being severally duly sworn on their respective oaths, depose and say that they witnessed the execution of the Will of SUSAN R. MULLINS *, the within named Testator, on the* 8th *day of* April *, 19* 74 *; that said Testator, in their presence, subscribed said Will at the end thereof and at the time of making such subscription declared the instrument so subscribed by said Testator to be said Testator's Last Will and Testament; that they, at the request of said Testator and in said Testator's sight and presence and in the sight and presence of each other thereupon witnessed the execution of said Will by said Testator by subscribing their names as witnesses thereto; that said Testator at the time of the execution of said Will, appeared to them of full age and of sound mind and memory and was in all respects competent to make a will and was not under any restraint.*

The aforesaid subscribing witnesses further state that this affidavit was executed at the request of

Susan R. Mullins

and that at the time of the execution of this affidavit the original Will, above described, was exhibited to them and they identified it as such Will by their signatures appearing thereon as subscribing witnesses.

Severally subscribed and sworn to before me this eighth *day of* April *, 19*74

Notary Public

John Alexander Signature

Hollis Niles Signature

Signature

Figure 7.2
AFFIDAVIT OF SUBSCRIBING WITNESSES

Section 3:

The Secretary in a Bank

Lesson 8
Work Organization:
Introduction to an Inbasket Exercise

OBJECTIVES

1. To work at increasing typing speed and accuracy
2. To continue building fluency in notetaking and transcribing
3. To discuss work organization

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Skills Brushup A. Shorthand 1. Dictation practice	Dictate warmup exercise of Fig. 8.1 from low to high speeds according to the ability of the class. Preview shorthand outlines on the chalkboard.
2. Transcription practice	Dictate letters from Fig. 8.2. Have at least one letter transcribed under timing in letter form, with one carbon copy. The letters for dictation in Figs. 8.1 and 8.2 are marked off in the usual 15-second intervals.
B. Typing	Using Fig. 8.3, have class do a typing warmup drill. Do speed spurts of varying time lengths, then drill for accuracy in copy. Be sure to cover the numbers drills. Following warmup drills, give two 5-minute timed writings from Fig. 8.4. Have students check each copy, circle errors, and hand in the better copy. Check to see if there is an improvement in number of words typed per minute and/or accuracy of copy over previous timings.
II. Inbasket Exercise	Distribute copies of the inbasket exercise appearing at the end of this lesson.
A. Purpose	Discuss with the class the purpose of the exercise, that is, to put one's self in the role of a person doing a particular job and making the necessary decisions. The exercise is an example of one section of the Certified Professional Secretary (CPS) examination. This type of exercise serves as a review for those desiring to take the examination. It is also an example showing some of the types of decisions that have to be made on the job involving job priorities and the planning of work.

(These exercises are marked off in the usual 15-second intervals. Pause 5 seconds between letters.)

(A) Dear Mr. Gregory: The fact that bank credit is available is of great impor-/ tance to many companies that may not be able to borrow for extended/ periods. These companies use the banks as a backup for a reserve source of cash./ Sometimes it is difficult for the businessman to determine in advance the amount/ of funds his business will need for a period in the future. There can be many/ unpredictable events that create the need for cash. Thus, if a business has/ a good credit standing with its bank, it knows it can borrow should unforeseen needs develop./ The use of bank credit is of unquestionable value to business. Very truly yours,/

[Pause]

(B) Dear Miss Craig. It is a pleasure to welcome you as a depositor of the Midland/ State Bank. We appreciate your opening an account with us and look forward/ to serving you.

The enclosed pamphlet describes the many convenient services which are/ offered by our bank — savings accounts, safe deposit boxes, personal loans, and/ many others.

We are open from 9 a.m. to 3 p.m. daily with the/ exception of Friday, when we remain open until 6 p.m. Our parking lot is/ right behind the bank.

If you have any questions, please get in touch with me. Sincerely,/

[Pause]

(C) Dear Mr. Martin: For over 50 years, the Midland National Bank has been a/ pioneer in the field of foreign banking.

Recently we added another country/ to the long list that we serve: an office was opened in Manila on July/ 1.

If you would like to know of the many services that this new bank can render/ to your business, you can learn about them by writing to us. Or if you are in/ our city, you may prefer to pay us a visit.

We look forward to hearing from/ you. Sincerely yours,

Figure 8.1
SHORTHAND WARMUP DRILLS
MARKED AT 60 W.P.M.

LETTERS TO DICTATE FOR TRANSCRIPTION PRACTICE: (Marked off in the usual 15-second intervals. Addresses can be supplied by the teacher or the class can make them up. Do not dictate the dictator's name and title. Pause 5 seconds between letters.)

(A) Dear Mr. Emory: We are pleased to inform you that our Board of Directors has/ declared a dividend of 2 percent on the common shares of the corporation./ This dividend will be paid July 31, 19__, to common/ stockholders of record on June 30, 1974.

In addition, stockholders will receive one full share of/ common stock for each 50 shares of common held June 30, 19__. No/ fractional shares will be issued, but in lieu thereof, the number of whole shares/ representing fractional shares in the distribution will be sold and the net cash proceeds/ distributed pro rata to each shareholder otherwise entitled to receive/ a fraction of a share. Sincerely./ [Edward K. Knox, Chairman of the Board]

[Pause]

(B) Dear Mrs. True: You are eligible, we are pleased to say, for one of our most/ valuable services, CREDCARDCHEK.

We invite you to double the usefulness of/ your checking account by using our bank-guaranteed CREDCARDCHEKS, at no additional/ cost to you, wherever you are not known and your personal checks may not be/ readily acceptable.

Bank-guaranteed CREDCARDCHEKS are honored both locally/ and nationally by stores, service stations, restaurants, resorts...wherever and/ whenever you wish to use them.

In addition, The Peoples Bank will hold $500/ in reserve, or more if you wish, for your use in the event you find it necessary/ to draw on all or part of this amount for some special purpose. The use/ of this cash reserve is described in the enclosed folder.

To add these conveniences/ to your checking account, Mrs. True, we need only your signature on the enclosed/ application and the information on the lines checked. It will not be necessary/ for you to fill in the complete form. Sincerely yours,/ [Howard K. Newcomb, Senior Vice President]

[Pause]

(C) Dear Miss Andrews: Re: Checking Account No. 4760-538-0/ As you requested, we have today closed your checking account and are enclosing our/ official bank check for $51.16 which represents your balance on our records./ The final statement will be mailed to you within the next few days.

We have been pleased to/ number you among our customers. If we can be of service to you in the future,/ please do not hesitate to contact us. Very truly yours,/ [Gregg Davis, Customer Services]

Figure 8.2
LETTERS TO DICTATE FOR TRANSCRIPTION PRACTICE
MARKED AT 60 W.P.M.

(A) Before you start your work project, warm up your fingers by typing the following words three times and the paragraph twice.

services handling mechanics routine percentage nation's settled transactions billions businessmen commercial

Business firms depend on banks for a wide range of important services. One such service of the banks is handling the mechanics of payment by check. The service is so routine that it is taken for granted. A high percentage of the nation's business transactions are settled by check. The business checks handled annually by the banks total billions of dollars. Banks, particularly commercial banks, are an important source of business credit.

(B) PRACTICE PARAGRAPH using symbols and punctuation marks. Type the paragraph, at least twice, until you can complete it accurately.

The notice read: "For the past 50 years, your bank's dividend record has been unbroken!* Next year we shall add an 'extra' of $1.20 a share of nonvoting stock, 21¢ more than this year. This 'extra' will be voted at the meeting which will take place on December 1 & 2 in Room 506. Can you be there?" *(Including dividends of nonvoting stock @ 5%.)†

(C) IMPROVE your number-typing skill. Practice the following without looking at the keyboard. YOUR GOAL: half your straight copy speed.

123 134 145 156 167 178 189 190 111 121 131 141 151 161 171 181 191
1213 2339 3537 4645 5950 6696 7370 8228 9199 0200 2378 5496 8032

(D) TYPE each line in the following two paragraphs three times. Type the number combinations as quickly as you type the words.

wet 235 tie 583 rye 463 pet 035 you 697 owe 923 wit 285 285
tow 592 rip 490 toe 493 our 974 pie 083 yet 635 too 599 599
weep 2330 tour 5974 type 5603 pity 0856 wept 2305 rope 4903
riot 4895 pipe 0803 wore 2943 your 6974 wire 2843 toot 5995

If you add 23, 46, 78, 34, and 19, the total should be 200.
We plan to study pages 18, 29, 36, 47, and 52 for the test.
Type 1 and 2 and 3 and 4 and 5 and 6 and 7 (continue to 50).

†The manner in which some of these symbols and punctuation marks are presented for drill purposes would not be acceptable in letter or report usage.

Figure 8.3
TYPING WARMUP DRILLS

DIRECTIONS: As you do these last three lessons, make the goal for your daily timed writing one of trying to type 50 words a minute within 2 errors. Use a 70-space line, 5-space tab indention, DS.

From time to time we like to remind our depositors of the many convenient services we offer — savings accounts, checking accounts, safe deposit boxes, personal and automobile loans, mortgage loans, among others — which go along with our slogan of "full service" banking. 11 23 35 47 52

In this instance the subject is United States Savings Bonds, which we handle as a service to our government and the public. Now, thanks to a $\frac{1}{2}$-percent interest bonus, Series E Bonds will pay $7\frac{1}{2}$ percent when held to maturity of 5 years and 10 months. 64 76 89 101

When all the other special features of Savings Bonds are taken into account — including safety, guaranteed return, and exemption from state and local income tax — the new bonus interest rate becomes doubly attractive. It is a better reason than ever to have part of your savings in this patriotic form. 112 124 135 147 158

Banks have a special reason to promote Savings Bonds because of the important role they play in the management of the public debt and the fight against inflation. We feel that when you buy Bonds you help your country as well as yourself. 170 183 196 206

Therefore, we hope you will accept this invitation to let us serve you in the purchase of U.S. Savings Bonds, either on an occasional basis or regularly through our convenient Bond-a-Month Plan. 217 229 241 245

Figure 8.4
5-MINUTE TIMED WRITING FOR LESSONS 8, 9, and 10

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
B. Design	The design is such that an invidivual has to make decisions about the order in which the jobs should be completed, planning the steps necessary to complete the jobs, and typing any jobs requiring it.
C. Explanation of priorities	In completing the exercise, the secretary must decide which items require and can receive immediate attention, which items require immediate attention but also require that material be checked or gathered, and which items can be done later in the day or at another time.
D. Planning job steps	Go over the planning steps with the students. For example: Suppose you checked the inbasket on your desk and found a telephone message slip telling you that your boss had to take his wife to the hospital and would be a half-hour late, and asks you to reschedule a meeting from 9 a.m. to 10 a.m. You would: (1) Read the message. (2) Call the necessary people and inform them of the change. (3) Inform your employer of the action taken, in writing or orally or both. On the job, there might be other things you would do but these are the minimum actions needed to complete the job. Planning ahead for many jobs during a day makes for more efficient use of your time. In doing so, you learn how long it will take you to complete certain jobs. Planning ahead also alerts you to information or materials you must secure in order to complete a job. Planning steps should be done in outline form, step by step. In some instances a step needs to be included indicating that the material completed is filed, sent to someone for signing or approval, edited, composed, typed (including number of copies), or whatever action is appropriate.
E. Defining *inbasket*	The term *inbasket* refers to the trays that are usually standard equipment on a desk. Frequently they are stacked one on top of the other. In one tray will be placed material coming to the secretary's desk to be completed or material she or he puts there to be completed — thus the term *inbasket*. The other tray can serve to hold outgoing mail or unfinished material for another time or day. The out-basket on the employer's desk would also be an *inbasket* for the secretary.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
F. Completing an exercise	Explain that for this exercise everyone will read through it, list the priorities, and list the planning steps, but will not complete the actions required for typing the materials. Following this, discuss with the class the decisions they made about the priorities and planning steps listed. *The Secretary's Inbasket* exercise, appearing on pages 78 through 82, is reprinted by permission from the December 1973 issue of *The Secretary* magazine published by the National Secretaries Association (International), Kansas City, Missouri. Note: Some time after writing this exercise, Eleanore Cunningham, CPS, author of the inbasket exercise mentioned above, was awarded a *CAM* designating her as a Certified Administrative Manager.

the Secretary's IN Basket

by Eleanore Cunningham, CPS

You are employed as secretary to Rhea Shea, director of personnel, R. W. Brown Company, a firm that employs approximately 200 people located in Chicago. When you arrive at the office at 8:45 a.m. on Tuesday, October 31, you meet Miss Shea who has just come into the office. She asks you to accompany her to the office of the president, Marc Weston, where she will attend an hour-long meeting scheduled for 9:00 a.m. She is scheduled to leave for San Francisco on an 11:00 a.m. flight to return to the office on Friday.

Without checking the mail which has already been placed on your desk, you pick up your notebook and pencil and leave the office with her. In the few minutes before the meeting is scheduled to begin, you and Miss Shea retire to a quiet corner away from other early arrivals and accept cups of coffee offered by the president's secretary. (Your discussion with Miss Shea is identified in Items 1 to 5.)

You return to your office and remove the papers from Miss Shea's out-basket and open the day's mail. You sort out extraneous material and Items 6 to 12 remain.

Categorize all items into three priorities: (1) to do before Miss Shea leaves for San Francisco, (2) to act upon the same day, and (3) to do later.

Next explain your disposition or handling of each item. Be sure to cover every item and account for your actions as completely as possible.

Lastly, type as many items requiring such action in the time remaining. Typed items need not be completed in the order of importance. To receive credit for typed work, letters must be in mailable form and memoranda also in acceptable form. Since *you* are the secretary in this exercise, use your own name where applicable.

The following information will be helpful to you in completing the exercise.

	SUN	MON	TUE	WED	THU	FRI	SAT
October	29	30	31				
November				1	2	3	4
	5	6	7	8	9	10	11

ITEL CORPORATION
Information Products Division
100 South Wacker — Suite 200
Chicago, Illinois 60606

INTERNATIONAL BUSINESS MACHINES
Office Products Division
590 Madison Ave.
New York, New York 10022

SPERRY RAND CORPORATION
Remington Rand Div.
1290 Avenue of the Americas
New York, New York 10019

Miss Jane Brisson
c/o The Breakers
Box 1780
Manitowoc, Wisconsin 54220

PRIORITY OF COMPLETION AND ACTION TAKEN:

First Priority Items & Action	Second Priority Items & Action	Third Priority Items & Action

ITEM 1

Our controller, Ed Hines, tells me that his secretary called him last evening to say she has to leave for Montana to deal with a family emergency. Because she is not sure when she'll be able to return to our city, she has resigned her post. A temporary, as well as permanent, replacement will have to be arranged immediately. I've told Ed you'll be working on this in my absence.

ITEM 2

I stayed late to complete the manuscript on the new personnel training book. The manuscript is on my desk. The pages I've just completed should be clean typed and the entire manuscript sent to Jane Brisson, who as you know is co-authoring the book with me. Jane is taking a month's rest at The Breakers, a resort in Manitowoc. Send it to her there with this note.

Dear Jane: Here's the manuscript at last. I'm still not at all satisfied with Chapters 3 and 4 which I feel should be expanded. Can you work on this while you're relaxing in the beautiful North Woods? You'll note, too, Jane, that the bibliography is incomplete. My secretary is compiling this and reports she can meet the November 15 deadline for the publisher. Can you get the two chapters in shape for that deadline? I'm on my way to San Francisco but will be back in the office this Friday, November 3. I'll call you around lunch time.

ITEM 3

By the way, cancel all appointments on my calendar scheduled Friday. I've a mountain of work and I must clear the deck before the weekend.

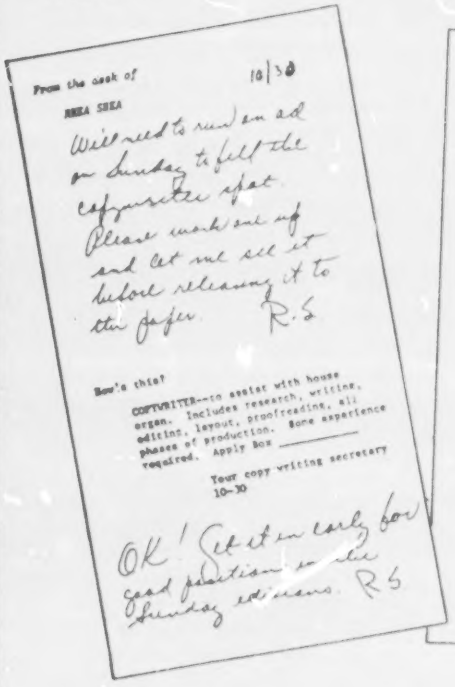
ITEM 4

It's very gloomy this morning, and snow is predicted. Better call the airline to confirm the 11:00 departure for my flight to San Francisco.

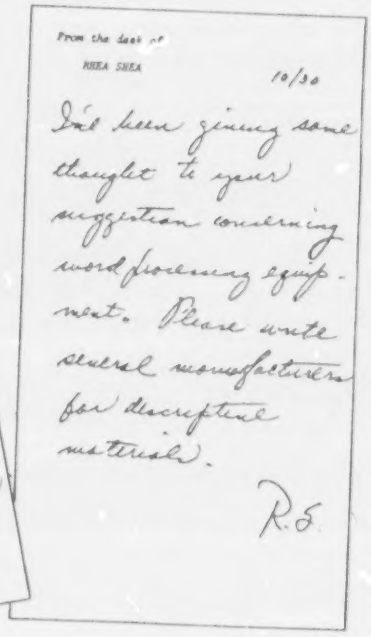
ITEM 5

I'm concerned that my season tickets to the opera have not yet arrived. Please check on it for me. Oh, I see the doors of the conference room have opened. . . . I'll have to go in now. I don't want to be interrupted during the meeting, but I expect to be back for about five minutes to go over last minute details before leaving for the airport.

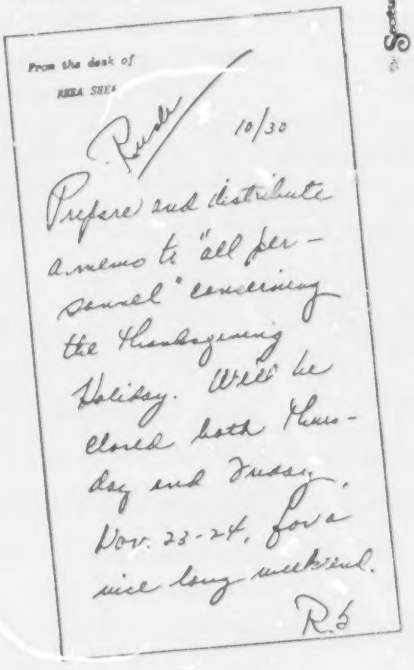
ITEM 6


From the desk of
10/30
REKA SHEA
Will need to run an ad on Sunday to fill the typewriter spot. Please mark one up and let me see it before releasing it to the paper. R.S.
How's this?
COPYWRITER—to assist with house organ. Includes research, writing, editing, layout, proofreading, all phases of production. Some experience required. Apply Box _____
Your copy writing secretary
10-30
OK! Get it in early for good position in the Sunday editions. R.S.

ITEM 7


From the desk of
REKA SHEA
10/30
I'd been giving some thought to your suggestion concerning word processing equipment. Please write several manufacturers for descriptive materials.
R.S.

ITEM 8


From the desk of
REKA SHEA
10/30
Prepare and distribute a memo to "all personnel" concerning the Thanksgiving Holiday. Will be closed both Thursday and Friday, Nov. 23-24, for a nice long weekend.
R.S.

ITEM 9

IMPORTANT MESSAGE

FOR Miss Shea

DATE 10/31 TIME 9:00 A.M. ~~P.M.~~

WHILE YOU WERE AWAY

M Miss Helen Prentiss

OF Purchasing Department

PHONE No. Home: 340 6782
AREA CODE NUMBER EXTENSION

TELEPHONED	X	PLEASE CALL	
CALLED TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		Left message:	

MESSAGE She won't be in today. She caught the bug. The three additional slides you ordered for your S.F. presentation are scheduled for delivery this a.m.

SIGNED Operator/rwb

LITHO IN U.S.A.

ITEM 10

IMPORTANT MESSAGE

FOR Miss Shea

DATE 10/31 TIME 9:05 A.M. ~~P.M.~~

WHILE YOU WERE AWAY

M WESTERN UNION

OF

PHONE No.
AREA CODE NUMBER EXTENSION

TELEPHONED	XX	PLEASE CALL	
CALLED TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	
RETURNED YOUR CALL		Left message	

MESSAGE CAN'T PICK YOU UP AT AIRPORT TUESDAY AFTER ALL. KEEP EVENING OPEN FOR DINNER AT FISHERMAN'S WHARF. I'LL CALL YOU AT YOUR HOTEL. John

SIGNED Operator/rwb

LITHO IN U.S.A.

ITEM 11

October 30, 19—

Miss Rhea Shea
Personnel Director
E. R. Brown Company
811 W. Wacker Drive
Chicago, Illinois 60606

Dear Miss Shea:

You will recall my interest in a position in your accounting department. My resume was submitted to you some months ago, and later I had the pleasure of meeting you to discuss my qualifications for such a position. You indicated at that time, Miss Shea, that an opening may come up in November.

I want you to know of my continued interest in working for your company. Should you wish me to send you an updated resume, please let me know.

Sincerely,

Sue Sterner

Sue Sterner
758 73rd Street
Chicago, Illinois 60676

ITEM 12

October 30, 19—

To: Rhea Shea

From: Marc Weston

Subject: CPS Study Classes

Your proposal to begin noontime study sessions for secretaries studying for the Certified Professional Secretary (CPS) examination will be discussed at the next managers meeting. Please route a study outline to each of the managers prior to the meeting for their information.

Plan to attend this meeting scheduled for 9:30 a.m. Monday, November 6, in my office, to explain the program and answer any questions which may come up.

MW/er

THE SECRETARY'S IN Basket

Recommended Priorities and Actions

AUTHOR'S COMMENTS

The dispositions cited below are not intended to be the only possible right actions taken by the secretary. Other acceptable actions may come to you as you independently work through the exercise. It is understood that a secretary will draw from her own experience and use her own good judgment in handling such or similar problems which are presented. Your methods of handling the items would be as correct, no doubt, as those suggested here. However, while it may or may not be your usual custom to report to your employer the actions you have taken—or as another example, to make notations for follow up— these actions are considered appropriate secretarial procedures important and necessary to the establishment of confidence in a good secretary-employer relationship.

ITEMS

Priority 1: 1 (or priority 2) - 4 - 9 - 10
Priority 2: 1 (or priority 1) - 2 - 3 - 6 - 11
Priority 3: 5 - 7 - 8 - 12

ACTIONS TAKEN

ITEM 1
Since the replacement for the controller has no relationship to Miss Shea's departure after the hour, this project need not be started, unless time permits, before Miss Shea leaves for San Francisco. Other items have greater priority, and it is not possible to determine just how much time would be needed to completely effect the results for the other Priority 1 items. However, the author acknowledges that a moment to call Mr.Hines might be taken, if only to let him know that you will give full attention to his requirements just as soon as you can assemble the slides and other materials which Miss Shea needs before she departs for San Francisco.
Action: Call Mr. Hines as described above. Later, call him again to get full particulars for the job position, or pull this information from files. Call for a temporary replacement either from the ranks of another department or temporary service. Then turn your attention to hiring a secretary checking first your personnel records to determine if there are applicants who should be considered for the spot. Make a note to report progress to Miss Shea on Friday.

ITEM 2
Action: Type the manuscript in final form; transcribe and type the letter and mail package of materials to Jane Brisson the same day. Refer a carbon copy to Miss Shea, and remind her to call Jane at the noon hour.

ITEM 3
In consideration of others, appointments should be cancelled that same day.
Action: Call people involved and remove from your and Miss Shea's calendars.

ITEM 4
A call to the airlines to determine whether or not planes are departing on time should be made just as soon as possible.
Action: Call airlines; report findings to Miss Shea.

ITEM 5
Action: Call or write regarding the delay in receipt of the opera tickets. If you opt for the telephone call, leave a memo for Miss Shea advising her; if you decide to write a letter*, hold the carbon copy for her attention on Friday, and mark it for follow up.

ITEM 6
Action: Type a letter* ordering the ad and call the newspaper in advance reserving good position. Hold file copy for Miss Shea's attention. Mark for follow up on Monday for responses to the ad. Alternative action may be to direct the ad copy to the company's advertising department for placement.

ITEM 7
Action: Type letters to manufacturers. Advise Miss Shea of action by routing copies of your letters to her. Mark the letters for follow up.

ITEM 8
Because employees need to be advised of upcoming days off just as soon as possible to make personal plans, this has a high rank in the priority column.
Action: Compose memo, type, and distribute, and possibly post on bulletin board. Advise Miss Shea that assignment has been completed.

ITEM 9
This is a *top* priority item. It will be necessary for you to track down the whereabouts of the expected, but missing, slides so that Miss Shea can take them to San Francisco. A call to the supplier, the receptionist, or receiving room, are in order.
Action: As above. When slides are received, put them in her brief case and advise her that materials are intact.

ITEM 10
Action: Advise Miss Shea of telephone message before she leaves.

ITEM 11
Possibly the applicant would fit into the position now vacant in the accounting department.
Action: Locate original application from files and Miss Shea's evaluation of the applicant. If qualified, call or write (or both) the applicant regarding the position now open. Miss Shea has given you authorization to move ahead in filling the vacancy. Keep Mr. Hines advised and report to Miss Shea when she returns.

ITEM 12
Because there is little Miss Shea can do about the memo before she leaves, this item is not given high priority; however, it ranks high in the work which must be accomplished while Miss Shea is gone.
Action: Pull from files the study outline; prepare and distribute a memo to managers with a copy of the outline to each; put the meeting on Miss Shea's calendar, and prepare to assemble other materials which she'll need to support her recommendation at the meeting on Monday. Other action would include calling (or writing*) Mr. Weston (or his secretary) to let him know that you have acted on his memo to Miss Shea in her absence, and have supplied the managers with the information. Put the meeting on your and Miss Shea's calendars. Refer the materials to Miss Shea. □

*In Part V of the CPS examination, points are given to the candidate for mailable letters and acceptable memos. Examinees should type as many letters and memos as the opportunities offer themselves. Thus, while you might in some of these situations use the telephone and get desirable and satisfactory results, a follow up letter (or memo) will gain further points for the examinee.

Lesson 9
Inbasket Exercise:
Day 1 as a Secretary in a Bank

OBJECTIVE

To have the students do an inbasket exercise

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Review of Previous Exercise	Review the inbasket exercise handed out at the last session. Answer any questions.
II. The New Exercise A. Students to work independently	Inform the class that now they will work independently on another inbasket exercise that you are going to hand out. In addition to the oral instructions which you will be giving them, they will also have written instructions.
B. Covers Day 1 of two days	The exercise is similar in format to the one just reviewed. But this new one is designed to cover two office days, Day 1 and Day 2. Only Day 1 is covered in this lesson.
III. Instructions for Students A. Priorities and steps to follow	Tell the class that they are to read through the material and list the priorities and the planning steps on the sheets provided.
B. Descriptions of steps	They are to describe the steps for completing each item and type any item that requires typing as part of the project.
C. Checkoff on Planning Sheet	As the students complete each item, they are to check it off on the Planning Sheet. Then any work not completed on this "day in the office" will be completed on the following day.
D. High quality needed	Emphasize that they are to work independently and as quickly as possible. The finished work should be of a quality acceptable to an exacting businessman. For example, letters are to be properly placed on the sheet, all work is to have no visible erasures, all parts must be complete.
E. All work to be turned in	All work will be handed in at the end of this session whether completed or not. All items should be submitted in the order in which they are done. Those fully completed should be checked off on the Planning Sheet.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
	Since this is an independent project, each person is to proceed on her or his own, without conferring with one another or with the instructor.
F. Letterhead to be assumed	Instruct the class that they are to assume there is a letterhead on the typing paper they use, and place their letters accordingly. Assume the letterhead takes up 2 inches of space at the top of the sheet.
G. Supplies needed	Check before handing out the exercise to see that everyone has the supplies needed. Also have extra supplies available.
1. List of supplies	The supplies needed are: typing paper, carbon paper, onionskin paper, envelopes (You can cut paper to simulate these). File labels and telephone message slips can be obtained and duplicated for the students.
	Instruct the class that they are to assume that for some items they have the materials needed. For the other items, they should indicate what supplies are needed. Also explain that in a working situation, materials and instructions for the examples to follow would be in a file or a procedures manual.
IV. Handing Out of Materials	Hand out the materials, each set in a folder. Ask that each student write his or her name on a label tab.
	Inform the class that you will stop them 10 minutes before the end of the session. This will give them time to put their materials together in their folders to hand in.
A. To work without help from instructor	Remind them that Mr. Decker (in the exercise) will be out of the office. So you, acting the part of Mr. Decker (in a sense), really aren't available once they start work, which is right now.
1. Evaluation of projects	NOTE: At the end of the session, after they do the work and hand in the folders, go over the work and make a list of any comments you have. Then, allow time to discuss the project with the class and go over suggestions or questions you might want to bring out as a result of your having gone over the materials you receive at the end of Day 1. You would not write any of these comments on the materials handed in to you.

INBASKET EXERCISE
Instructions to the Student
Day 1

Before taking any action in this exercise, be sure to read all of the following instructions.

The following tasks are designed to place you in a roleplaying situation. The various activities will test both the application of your basic office skills and your judgment. In some cases, the instructions may not be as clear as you would wish, and you will be left on your own initiative. This is based on the assumption that you are prepared to function effectively as a responsible secretary with a minimum of directions from your employer.

SITUATION: You are Brenda Jackson, secretary to Ronald Decker, manager of the County Bank of Indian Heights, New York. Your job covers all phases of the bank's office activities. You are responsible for: setting up the necessary materials and information for reports, following up on delinquent accounts, maintaining office files, and taking and transcribing dictation.

You handle routine correspondence, answer the telephone, and contact other people in the bank and outside to obtain or supply information needed. Your decisions will indicate your executive ability, and the way you complete the tasks will show the quality of your work.

YOUR ASSIGNMENT: As you enter the office at 9 a.m. on Tuesday, June 4, Mr. Decker greets you and asks you to come into his office. He tells you that he has to leave at 10 a.m. to appraise a piece of property and will return at 12:30 p.m. He is scheduled to leave for New York City on the 2 p.m. flight and return to the office Thursday morning.

You pick up your notebook and pen and enter Mr. Decker's office. Mr. Decker goes over Items 1-5 with you and tells you what to do with them, as explained below. You return to your desk, check your inbasket, and open the mail. You sort out unimportant materials and Items 6-9 remain.

BEFORE YOU DO ANY TYPING do the following:

1. Review all items in this exercise (1-9). Decide the order in which the items should be done, taking importance and time requirements of each into consideration.
2. On the Priority of Jobs Sheet, record the numbers of all items (1-9) with each number in the column you have decided on. The definitions of the priorities are:

   First Priority. Things to do before Mr. Decker leaves for New York.
   Second Priority. Other things to do today.
   Third Priority. Things not in the first or second priorities. Do these last.

3. On the Planning Sheet, briefly list the actions you need to take to accomplish all the items in the exercise.

After you have completed the three steps described above, type as many items requiring typing as you can in the time remaining. Use your best judgment and type all material in mailable form.

MR. DECKER'S EXPLANATIONS of Items 1-5 follow.

ITEM 1 Here are my notes appraising the property Mr. Kingston wants to buy. I need to sign the appraisal report before it goes on to Acker and Barnaby for their approval. The Loan Committee meets this Thursday.

ITEM 2 (a) We need a financial statement signed by Mr. Kingston. Send the following letter to him with a blank copy of the Financial Statement for him to complete, along with his copy of his application for the loan. Dear Mr. Kingston: Re: Mortgage Loan
We are pleased to have the privilege of handling your mortgage loan. (P) Enclosed for your file is a copy of your application for a mortgage loan. (P) As it is necessary for us to have a signed statement of your financial condition, we are enclosing a blank Financial Statement for you to complete and return in the enclosed envelope. (P) If you have any questions, please get in touch with us. Sincerely,

(b) For the credit check on Mr. Kingston, I have already sent the form requesting that check to the credit bureau whose service we subscribe to. You can just file my notes and the carbon copy of the form with the other papers in Mr. Kingston's file.

ITEM 3 That was a bad thunderstorm we had last night. I understand several areas are flooded. Better check with the airline to confirm my 2 p.m. flight to New York City.

ITEM 4 The officers have approved our hiring a stenographer to help ease your heavy workload. Linda Lefter has been tentatively selected. Before a final decision is made, the usual reference check is to be done. Send the Work Experience Check for her. You'll find the names of her former employers on the form she filled out.

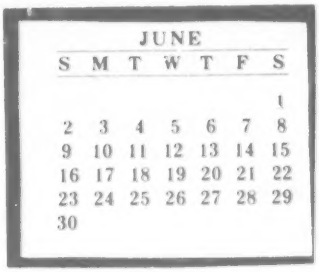
ITEM 5 Cancel my dental appointment for tomorrow with Dr. Denby. If possible, make an appointment for next week, Thursday, anytime before noon.

Can you have the appraisal form finished so I can sign it before I leave today? Then if there are any questions, Acker and Barnaby can check them out before our meeting on Thursday.

Following is additional information you will find helpful in completing the exercise.

All the following addresses are in Indian Heights, New York 23200.

Manfred E. Kingston, 89 Court Lane
River Valley National Bank, Route 76
B. W. Hemingway and Sons, Inc., Arcadia Mall
William H. Mallard Pontiac Dealers, 12 Country Lane
Katherine Oliver, 10 Feather Lane
Pop's Print Shop, 3517 Sheridan Street



PRIORITY OF JOBS SHEET

First Priority	Second Priority	Third Priority

Figure 9.1

PLANNING SHEET

Item No.	Explanation of Actions to be Taken

Figure 9.2

Property: 10 WILLOW LANE
INDIAN MEADOWS
BROOME COUNTY
NY

Block 4, Lot 2, Ward 14, Section 3

Applicant: ~~M. E. Wallace~~ M. E. Kingston

Owner: J. B. Miller

Tenant: None

Brief descrip.: Lot 70'×200'; split-level, 6 rm
2 baths, fireplace, no cellar,
2-car garage, paved driveway
aluminum siding, village water
and sewage, landscaped, middle to high income
neighborhood, desirable location

Description of neighborhood & lot:

Type: Residential
Rating: Excellent
Age: New
Trend: Up
Utilities: Water, light, sewer, gas
Street: Paved, graded
Dist to: (all four - 8 miles)

Figure 9.3C
(For Item 1)
NOTES FOR APPRAISAL REPORT (concluded)

Typical fam inc : $15,000 - 30,000
Sub prop. conf. : Comparable
Zoning : Resid. ~~only~~ Non-comm.

Building
Type - Dwelling
Age - 4 years
Qual. const. - excellent
Ext. walls - aluminum siding
Roof - slate
Foundation - ~~cement~~ concrete block
~~Basement~~ - None
Plumbing - Tiling, bath shower lavatory
Copper tubing - plastic tubing kitchen

Interior walls - Dry wall, paint finish
Floors - Oak + inlaid = trim of hemlock + oak

Heat + fuel - Electric - ~~Fireplace~~
Tank + water heater - Electric
Insulation - Sheet rock
Fireplace - Family room

Figure 9.3B
(For Item 1)
NOTES FOR APPRAISAL REPORT (continued)

General condition

Interior
- Floors — excellent dwelling, ↔ (garage needs paint)
- Walls — "
- Heating — "
- Plumbing — "
- Equipment — "

Exterior
- Walls — "
- Roof — good (needs replacement 4 yrs)
- Fdn — "
- Yard — excellent
- Closet space — "
- Floor plan — very good

There is no evidence of termites, dry rot, dampness or settlement. Marketability good - property & grounds in excellent condition.

Value Est		Date
Land	$12,000.	6/17/74
Bldgs	40,000	
	$52,000	

R. Docker

Figure 9.3A
(For Item 1)
NOTES FOR APPRAISAL REPORT

APPRAISAL REPORT

PROPERTY ADDRESS | CITY | COUNTY | STATE

BLOCK | LOT | WARD | SECTION

APPLICANT | OWNER | TENANT

BRIEF DESCRIPTION

DESCRIPTION OF NEIGHBORHOOD AND LOT

TYPE	RATING	AGE	TREND	UTILITIES	STREET	DIST. TO
RES.	EXCELLENT	NEW	UP	WATER	PAVED	SCHOOLS MI. BLK.
APT.	GOOD	MODERN	DOWN	LIGHT	GRADED	STORES MI. BLK.
BUS'NS	FAIR	OLD	STATIC	SEWER SEP. TANK CESSPOOL	S. WALKS	BUS-R.R. MI. BLK.
AGE BLDG. YEARS	POOR	BUILT UP %	TO:	GAS	CURBS	CITY CEN. MI. BLK.

TYPICAL FAMILY INCOME | SUB. PROP. CONFORMITY TO NEIGH. STANDARDS | ZONING

BUILDINGS

TYPE	AGE	QUALITY CONST.	EXT. WALLS	ROOF	FOUNDATION	BASEMENT
DWL.						
GAR.						

1ST FLOOR	2ND FLOOR	3RD FLOOR	PLUMBING TILING: BATH—SHOWER—LAVATORY—KITCHEN	FIXTURES—PIPES

INTERIOR WALLS	FLOORS	HEAT AND FUEL	TANK AND WATER HEATER	INSULATION	FIREPLACE

GENERAL CONDITION

	INTERIOR					EXTERIOR				ADEQUACY	
	FLOORS	WALLS	HEATING	PLUMBING	EQUIPMENT	WALLS	ROOF	FOUNDATION	YARD	CLOSET SPACE	FLOOR PLAN
DWL.											
GAR.											

EVIDENCE OF TERMITES | DRY ROT | DAMPNESS | SETTLEMENT

MARKETABILITY: GOOD | FAIR | SLOW | DIFFICULT

VALUE CERTIFICATION

We (I) hereby certify that we (I) have examined the property described in this report INSIDE and OUTSIDE or PLANS and SPECIFICATIONS of buildings to be erected, and in our (my) opinion the Value of the Land and Buildings for mortgage purposes is as follows :

"AS IS" VALUE

LAND $ _____ DATE _____ APPRAISER'S SIGNATURE

BUILDINGS $ _____ DATE _____ APPRAISER'S SIGNATURE

TOTAL $ _____ DATE _____ APPRAISER'S SIGNATURE

Figure 9.3D
(For Item 1)
APPRAISAL REPORT FORM

Dear _____:

RE:

The person referred to above is being considered for a position in this bank. He (or she) indicates having been employed by you as stated below. We would appreciate very much your verifying or correcting this information.

Employed as: This is correct____ Incorrect____
Dates employed: correct____ Incorrect____

Correcting information (if needed): _____

_____

_____

Why did this person leave your employ? _____

_____

_____

If possible, please rate this individual on the basis of employment with you. (Please check appropriate spaces.)

	Excellent	Good	Average	Fair	Poor
Quantity of Work	_____	____	_____	____	____
Accuracy of Work	_____	____	_____	____	____
Neatness of Work	_____	____	_____	____	____
Cooperation	_____	____	_____	____	____
Attendance	_____	____	_____	____	____

Further comments

_____

_____

_____

Your answers to the above questions will be appreciated and will be kept strictly confidential. A stamped self-addressed envelope is enclosed for your convenience.

We shall be glad to provide similar information for you at any time.

Very truly yours,

Figure 9.4A
(For Item 4)
WORK EXPERIENCE CHECK (Office Employees)

Linda Lefter

PREVIOUS BUSINESS EXPERIENCE (List in order with last employer first.)				
Name of Company	Address	Job Duties	From	To
A. M. Laboratories	Industrial Plaza Rochester	Steno	6/61	1/70
Seaboard National Bank	External Highway Lake Ronkonkoma	Steno	1/70	6/72
Heritage Real Estate Agency	Avenue of the Americas, NYC	Steno	6/72	

Figure 9.4B
(For Item 4)
PREVIOUS EMPLOYERS OF LINDA LEFTER

SAMPLE (Mr. Decker likes his memoranda arranged this way.)

M E M O R A N D U M

TO: All Personnel FROM: Ronald Decker
Manager

SUBJECT: Memorial Day
May 30, 19__ DATE: May 13, 19__

Prepare a memo to "all personnel" concerning the holiday for the fourth. We'll close on July 4, Thursday.

Place memo on front Bulletin Board.
Ed

Figure 9.5
(For Item 6)
MEMO ABOUT JULY FOURTH CLOSING

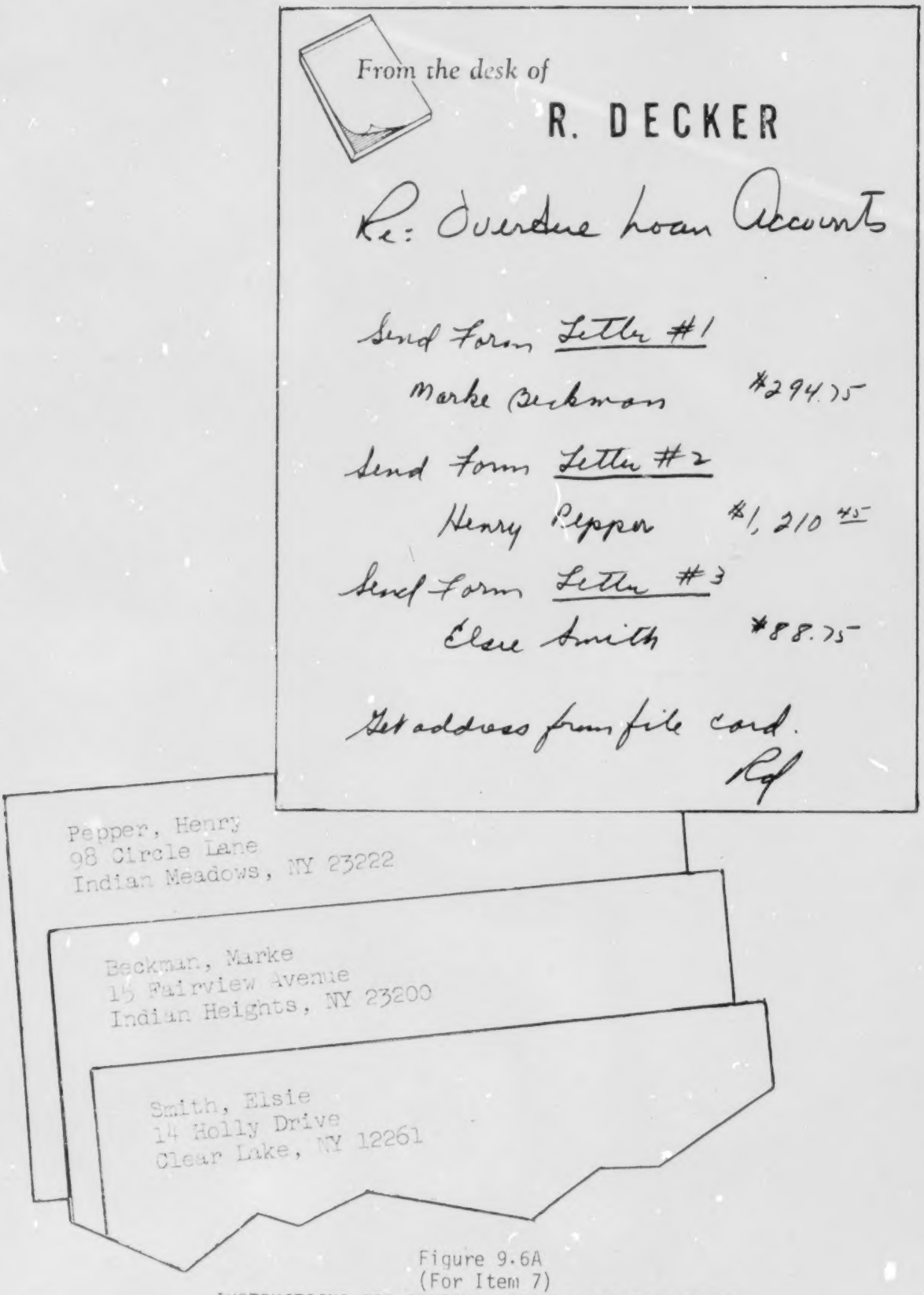


Figure 9.6A
(For Item 7)
INSTRUCTIONS FOR SENDING OVERDUE ACCOUNT LETTERS

Overdue Form Letter No. 1 Date

Dear _____:

A payment of $_____ was due on your loan on the first of this month and has not been received here. Please come in as soon as possible and make this payment or mail us a check or money order in the enclosed envelope.

If you have mailed this payment within the past three days, just disregard this letter.

Sincerely yours,

- -

Overdue Form Letter No. 2 Date

Dear _____:

On _____ we wrote you about an overdue payment on your loan but we have still not received the payment. If we do not receive your payment within five business days of the date of this letter we shall have to consider your account delinquent.

However, if you have encountered a special problem related to making payments on your loan, please come in and speak to one of our loan officers within the next five days.

Sincerely yours,

- -

Overdue Form Letter No. 3 Date

Dear _____:

We have written you twice about a payment due on your loan and have received no response from you. We now consider your account DELINQUENT.

If it becomes necessary for our Legal Department to collect this loan, you would incur additional costs beyond interest charges. It is also possible that you would be penalized further. If we do not hear from you within three business days from the date of this letter we will be forced to turn your account over to that department.

Sincerely yours,

Figure 9.6B
(For Item 7)
FORM LETTER FOR OVERDUE ACCOUNTS

Brenda: Retype letter with corrections noted, on letterhead. Send to printer by Wednesday, June 5. Order 5,000 copies. Make one copy for file and send one copy to my desk. Need gone is— use my signature stamp.

COUNTY BANK OF INDIAN HEIGHTS

Dear Depositer:

Will you consider a free regular checking account wth our bank?

Yes, you will! Let us tell you why you should. Wouldn't you appreciate saving an average of $25 a year on checking account activity charges?

Good News! County Bank of Indian Heights is about to announce the offer of checking accounts to individuals who have a balance of $1,000 or more deposited. free

The announcement will be made to the general public in just a few days but we wanted you to share this "good news" first since you are a current depositor.

To enjoy this free service, simply open a savings account for $~~100~~ or more to apply for this free checking account. It can be a: 1,000

1. Regular Savings Account
2. Three Start Account
3. Savings Certificate

At your request, we will make all the arrangements in the transfer of funds any any other bank. from

Free checking accounts--County Bank of Indian Heights is demonstrating that "we are here to help you!"

Sincerely yours,

~~Ronald~~ Decker
Manager RONALD

Figure 9.7
(For Item 8)
FORM LETTER SOLICITING CUSTOMERS
FOR CHECKING ACCOUNTS

R.D. TEXTILES

Arcadia Mall
Binghamton, NY 13678

518 706 4356

June 3, 19__

Mr. Ronald Decker, Manager
County Bank of Indian Heights
Indian Heights, New York 23200

Dear Mr. Decker:

RE: Account No. 034 7614 083

Will you please order 5,000 voucher checks from the printer, sample attached, numbered 5,001 to 10,000. As we agreed in our telephone conversation today, these are the changes to be made:

	from	to
address:	189 Central Avenue	Arcadia Mall
signature:	President	Vice President/Office Manager

Glad to note usual discount will be given. We have a three-month supply on hand, so no need to rush. Thank you for your cooperation.

Sincerely,

Judson Moore

Judson Moore
President

JM/ce
Enclosure

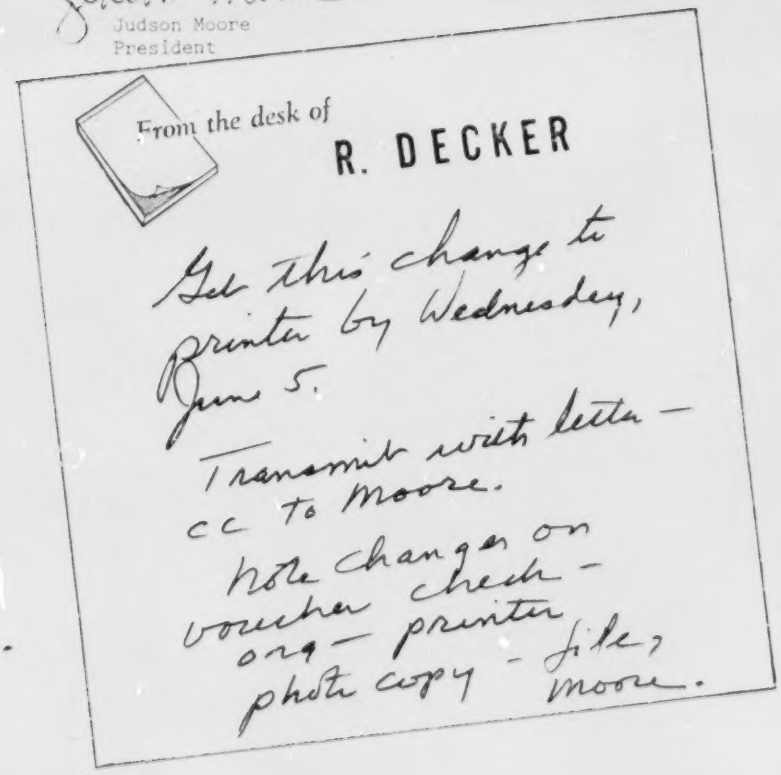

From the desk of
R. DECKER
Get this change to printer by Wednesday, June 5.
Transmit with letter — cc to Moore.
Note changes on voucher check — orig — printer, photo copy — file, Moore.

Figure 9.8A
(For Item 9)
INSTRUCTIONS FOR PRINTING
VOUCHER CHECK FORM

R.D.TEXTILES
189 Central Avenue
Binghamton, NY

NO. 4999

PAY

Date

To the order of

DOLLARS $

President

Date	Description	Inv. No.	Amount	Discount	Deductions	Net Amount

Figure 9.8B
(For Item 9)
VOUCHER CHECK FORM

FOR THE TEACHER
Recommended Priorities and Actions
For Day 1

COMMENTS: While it is not the usual custom for a secretary to make a list of the actions she will take in following through on a job, these steps are part of the thought processes in getting the work done. The purpose is to stimulate secretaries to be "thinking" secretaries. This applies the old adage "First things first." Some secretaries need more training in organization and also need more training for improvement of personal efficiency.

The following are suggested actions. There may be other acceptable actions that the students will decide to take, from their own experience or knowledge.

First-priority items are those that require immediate attention and can be done with no further instruction. Second-priority items are those which are relatively urgent, but which require time to gather information. Third-priority items may be done as time permits. Within any one priority category, the items do not have to be done in the order shown on the Priority of Jobs sheet.

Recommended priorities are:

Priority 1: 3, 5, 1
Priority 2: 2a, 8, 9
Priority 3: 2b, 7, 6, 4

EXPLANATION OF ACTIONS TO BE TAKEN BY STUDENTS

ITEM 3 Call the airline immediately to verify the 2 p.m. flight to New York City. Tell Mr. Decker.

ITEM 5 Call Dr. Denby, cancel Mr. Decker's appointment, and ask for appointment for next Thursday, June 13, before noon. Tell Mr. Decker or put message on his desk. Correct the notation of the appointment on his calendar and yours.

ITEM 1 Type the Appraisal Report form (original and 2 c.c.) from Mr. Decker's notes. Put the form on Mr. Decker's desk for his signature. Follow up later in the day in order to refer the form to Acker and Barnaby.

ITEM 2 (a) Type letter of transmittal with 1 c.c. and envelope. Enclose: application for loan, Financial Statement form, envelope bearing return address. Put all of this on Mr. Decker's desk for his signature.

These enclosures should be noted on the letter even though the material is not available to put with the letter. (In your previous instructions, students were informed that not all materials were available.)

(b) The credit check requires no further action now. Just file Mr. Decker's notes with the related papers.

ITEM 8 Edit and type final copy with two carbon copies. Type note for printer from Mr. Decker with two carbon copies (one for your file and one for Mr. Decker's). Put in envelope addressed to printer.

ITEM 9 Compose and type letter to printer. Make changes in voucher check form. Make two photocopies of voucher check form. Put one copy in envelope to printer and give one to Mr. Moore.

ITEM 7 Form letters are attached. (In an actual business, a stenographer would consult a procedures book for form letters.) Type each letter with 1 c.c. and an envelope.

ITEM 6 Compose and type the memo with 1 c.c. Put original on bulletin board.

ITEM 4 Form letter is attached. Type each letter with 1 c.c. and an envelope.

Lesson 10
Inbasket Exercise:
Day 2 as a Secretary in a Bank

OBJECTIVE

To continue with inbasket exercise

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
I. Inbasket Exercise for Day 2	Before handing out the exercise which covers the second day at the office, inform the class that they are to read this material as though they were entering the office the day after the last session.
A. Planning of day	At the beginning of each workday, the secretary on the job has to plan her day and budget her time to achieve efficiency. She will have the current day's activities, things from the day before, and things that are ongoing including tasks that can be done whenever there is a moment to fit them in. For instance, such things can be done while waiting to get information from someone for another job.
B. New tasks	This exercise includes several new tasks (Items 10-14) and some left over from Day 1. This mix of things to be done will make it clear that a secretary has to make decisions on which tasks to do and in what order. In addition, she (or he) should be aware of how long it takes to do particular things.
C. Interruptions, too	In an on-the-job situation there are interruptions from the telephone and people stopping by. These interruptions are factors in determining the length of time it takes to complete a job.
D. Reading of material	In continuing this exercise, the students are to read the material for Day 2. They are then to review unfinished items from Day 1. Next, they should make a new Priority of Jobs Sheet (Fig. 9.1) and a new Planning Sheet (Fig. 9.2), and enter priorities and steps for action on those sheets.

CONTENT OUTLINE	CONTENT DETAILS AND TEACHING TIPS
E. Supplies needed	Check to see that everyone has the supplies needed. Also keep extra quantities on hand. These supplies include: typing paper, carbon paper, onionskin paper, and envelopes (simulated by paper cut to size). You should also obtain file labels and telephone message slips.
F. File labels	Explain that in actual practice a strip of file labels would be inserted in the typewriter, and the names typed on them. Then the strip would be removed from the typewriter and the labels would be pasted on the tabs of the file folders. These labels can be bought with a colored edge for subject coding, if desired. Ask if there are any questions. Remind them that in a sense you are Mr. Decker. Therefore you will not be present for questioning after their work starts.
II. Helpful Procedures A. Plan for end of session	Tell them that 20-30 minutes before the end of the session they will be asked to stop working and to hand in all materials complete or incomplete. Then the priorities and planning steps will be discussed, as well as any questions on the exercise. Hand out the instructions and materials for Day 2 on the job. Also make the materials from Day 1 available.
B. Discussion of priorities	There were certain items that had to be done first on Day 1 because Mr. Decker was leaving the office. On Day 2, items needed for the meeting on Thursday should be completed first. These would be done so Mr. Decker could review them upon his return to the office.
C. Materials kept on desk	Point out that when an employer is away from the office, the secretary often puts pending materials in a folder on the desk. She would then have it available in case he should call. Also, she would have everything together to place on his desk upon his return. Her goal is to make life easier for both herself and her employer.
D. Discussion of problems	Before passing out copies of Instructions to the Students, discuss things about which there might be questions. These might include problems you noted on looking over the first day's work. Examples are: letter placement, envelope setup, arrangement of tabulated material, filling in forms, following through on actions, and making

CONTENT OUTLINE

CONTENT DETAILS AND TEACHING TIPS

notations on carbon copies. Other possibilities are: why plan in advance, the responsibility for efficient organization of the work station, examples of "how to do" it better, and any other points the class might bring up.

INBASKET EXERCISE
Instructions to the Student
Day 2

Before taking any action in this exercise, reread the first page of Instructions to the Student for Day 1 in Lesson 9, page 85.

YOUR ASSIGNMENT FOR DAY 2: When you enter the office this morning, you check your inbasket, your folder of unfinished business, and your mail. As you are doing this; the phone rings.

ITEM 10 As you reach for the phone you pick up a pen and push your telephone message pad to a place where you can write on it easily. It's Miss Elsie Doolittle who wants to talk to Mr. Decker. You ask if you can help and she indicates she wants to apply for a personal loan but can't get to the bank. She wants to know if you can send her the necessary application form for her to sign. You know she has been a depositor for several years and the bank holds the mortgage on her house. You tell her you'll put the blank form in the mail today.

Now, before taking any action on the tasks for Day 2, record the priorities of those tasks (on copy of Fig. 9.1) and then record the steps required for each (on copy of Fig. 9.2). In deciding on the priorities, take items 10 through 14 together with any tasks left undone from Day 1.

Once you have done that, proceed to type as many items requiring typing as you can in the time remaining. Use your best judgment in setting up the material in mailable form.

The following additional information will be helpful to you in completing the exercise.

For routine letters, you have the authority to sign Mr. Decker's name when he is away. Because Mr. Decker is extremely busy and because you do not always have time to research material for him, he frequently has Mr. Quimby get materials together for him.

Mr. Decker recently started the sending of a good will letter to each new savings account depositor. He likes these letters to go out within two weeks of the time the account is opened.

You will find handwritten notes with items 11 through 14 explaining what needs to be done for those items. Following are two addresses you will need:

Miss Elsie Doolittle
Hobby Hill Farm
Horseheads, NY 13676

American Bank Directory
1558 Pennsylvania Avenue
Harrisburg, PA 87692

To R. DECKER

Date 6-5- Time 8:45am

WHILE YOU WERE OUT

Mr. Turner

of Wheatly Industries

Phone 356. 2424

TELEPHONED	✓	PLEASE CALL HIM	✓
CALLED TO SEE YOU		WILL CALL AGAIN	
WANTS TO SEE YOU		RUSH	

Message Can RD substitute as speaker at Chamber of Commerce dinner next Tuesday? George in hospital.

Operator

Figure 10.1
(For Item 11)
MESSAGE ABOUT SUBSTITUTE SPEAKER

From the desk of

R. DECKER

Brenda -

Send for 1 copy of the spring edition of the American Bank Directory, NYS

Cost is $3.50 including postage and handling.

Get check from Fritz.

RD

Figure 10.2
(For Item 12)
ORDERING OF BANK DIRECTORY

COMPLETE 5 COPIES. MTG FRIDAY

forget — Tabs Blank on stencil enough space for 6 letters

COMPARATIVE ANALYSIS OF FIRST QUARTER OPERATIONS
COUNTY BANK OF INDIAN HEIGHTS
INDIAN HEIGHTS, N.Y.

YEAR	GROSS PROFIT	OPERATING EXPENSES	NET PROFIT
1967	$ 34,627	$ 31,328	$ 8,299
1968	43,421	27,998	15,423
1969	44,298	29,490	14,808
1970	47,943	28,842	19,101
1971	50,329	29,329	21,000
1972	65,184	28,071	37,113
1973	71,450	28,050	43,400
1974			
1975			
1976			

Triple Space

TYPE 5 COPIES MTG FRIDAY MAY

PERSONAL LOANS
OVERDUE LIST

ACCT. No.	30-DAY	60-DAY	AMOUNT
3617	X		$602.51
4276		X	706.81
5764	X		987.62
8923	X		83.91
9761		X	76.43
9968		X	51.80

FROM THE DESK OF H. Quimby

Brenda
Mr. Decker asked for the attached information for the Loan Committee meeting Thursday -
Hank

Figure 10.3
(For Item 13)
TYPING OF OVERDUE LOANS LIST
AND QUARTERLY REPORT

LETTER TO NEW SAVINGS ACCOUNT DEPOSITORS

(Date)

Dear - - - - - -:

We are very glad to welcome you as one of our depositors. It is gratifying to know that you have selected the County Bank of Indian Heights to handle your savings account.

You may find our Bank-by-Mail Service convenient. An envelope designed especially for this purpose is enclosed. Your passbook is mailed back to you the same day it is received. You can make withdrawals as well as deposits, and we pay the postage both ways.

Why not use it the next time you find it more convenient to bank by mail?

Sincerely,

Ronald Decker
Manager

Enclosures

NEW SAVINGS ACCOUNTS

Week ending 5/31

Amy Johnson
1379 Main Street
Syracuse, NY 13567

Richard R. Brant
840 Broadway
New York, NY 12020

Sally McGhee
1416 Market Street
Poughkeepsie, NY 26543

Aaron Shelby
4398 Parkhurst Drive
Bradford, PA 56345

Garry Herrbold
The Centre Building
Indian Heights, NY 03200

Philip Blair
Church and College Streets
Newark, NJ 07102

FROM THE DESK OF

J. Cunningham

Brenda—
Here's the list—
of the new savings
account depositors
for last week—
thru 5-31.

Annie

FIGURE 10.4
(For Item 14)
LETTER TO
NEW SAVINGS ACCOUNT DEPOSITORS

FOR THE TEACHER
Recommended Priorities and Actions
For Day 2

Before reading what follows, you should reread the first three paragraphs of FOR THE TEACHER, Day 1, on page 99. The following are recommended actions.

The priorities and planning steps for Items 11-14 should be done along with the items remaining from Day 1.

Recommended priorities are:

Priority 1: 10, 11
Priority 2: 12 (could be Priority 3), 13
Priority 3: 14

EXPLANATION OF ACTIONS TO BE TAKEN BY STUDENTS

ITEM 10 Make note of the call on a telephone slip for Mr. Decker. Also leave him a note that you sent the application loan form to Miss Doolittle (after you send her the form). Type envelope and insert form. (Use a sheet of paper to simulate the form.) Compose a covering letter and send it along. (Yes, a thinking secretary would. It should refer to the telephone call, and the form, and say that Mr. Decker will be in touch with her.)

ITEM 11 Call Mr. Turner. Tell him Mr. Decker will be back Thursday, June 6, and you'll ask him to get in touch with Mr. Turner then. Place the telephone slip on Mr. Decker's desk with a note about your telephoning Mr. Turner. Put a note on your calendar to check with Mr. Decker about this.

ITEM 12 Call Fritz and ask her to make out check for $3.50 today. Give her name of company. Compose and type letter with 1 c.c. and envelope. Note check number in letter.

ITEM 13 Edit and type original and four copies of each of the two tables. Check and put on Mr. Decker's desk.

ITEM 14 The form letter needed is in Fig. 10.4. (In an actual business setting, a stenographer would consult a procedures book.) Type labels and put on folders. Type letters with 1 c.c. and an envelope. File c.c. in folder and put file folders in file drawer. This is a low priority item. It should be done when all other items are finished. Note that any of the items Mr. Decker needs for the meeting on Thursday should be finished before other things.

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